REPORT RESUMES

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IDENTIFICATION OF MAJOR TASKS PERFORMED BY MERCHANDISING EMPLOYEES WORKING IN THREE STANDARD INDUSTRIAL CLASSIFICATIONS OF RETAIL ESTABLISHMENTS.

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BY QUESTIONNAIRE, FACTS WERE OBTAINED REGARDING 12 CATEGORIES OF MERCHANDISING PERFORMED BY 609 SUPERVISORY AND NONSUPERVISORY PERSONNEL OF 33 DEPARTMENT, LIMITED-PRICE VARIETY, AND GENERAL MERCHANDISING STORES. THIS SAMPLE WAS SELECTED FROM A POPULATION OF 13,643 MERCHANDISING EMPLOYEES, WORKING IN A TOTAL OF 234 FIRMS, IN KING AND PIERCE COUNTIES, WASHINGTON. THE WORK CATEGORIES WERE SELLING, STOCKKEEPING, CHECKSTAND OPERATION, MERCHANDISE RECEIVING AND MARKING, DELIVERY, RECORD KEEPING, COMPUTING, DISPLAY, ADVERTISING, BUYING, PRICING, AND MERCHANDISE CONTROL. DATA GATHERED BY THE QUESTIONNAIRE WERE USED TO CALCULATE PERCENTAGES OF EMPLOYEES PERFORMING EACH CATEGORY OF WORK. OTHER COLLECTED DATA PROVIDED A PROFILE OF THE WORKERS IN TERMS OF OCCUPATIONAL TRAINING, EDUCATION, SEX, AGE, EXPERIENCE IN PRESENT OCCUPATION, JOB MOBILITY, EMPHASIS OF HIGH SCHOOL STUDY, AND GROUPINGS OF MAJOR TASKS PERFORMED. THIS INFORMATION WAS TO BE USED IN IDENTIFICATION AND ASSESSMENT OF KNOWLEDGES AND KNOWLEDGE CLUSTERS MOST LIKELY TO PROVIDE BASES FOR TRAINING AND CAREER-LONG ADVANCEMENT. THE KNOWLEDGE ASSESSMENT STUDY WAS IN PROGRESS AT THE TIME OF REPORTING, AND FURTHER ANALYSIS OF THE QUESTIONNAIRE DATA WAS TO BE POSTPONED UNTIL AFTER ITS COMPLETION. THIS VOLUME REPRESENTS PART 6 OF THE 13-PART FINAL REPORT ON THE VOCATIONAL-TECHNICAL EDUCATION RESEARCH AND DEVELOPMENT PROJECT OF WASHINGTON STATE UNIVERSITY. RELATED VOLUMES ARE ED 010 652 THROUGH ED 010 664. (JH)

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U. S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

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Bureau of Research

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Project No. ERD-257-65
Contract No. OE-5-85-109

Kenneth A. Ertel

December, 1966

The research reported herein was performed pursuant to a contract with the Office of Education, U.S. Department of Health, Education, and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

University of Idaho

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INTRODUCTION

Task and Knowledge Clusters Concepts

One major purpose of Project ERD-257-65 is to identify clusters of knowledge and competencies most likely to maximize the career-long occupational opportunity, competence, and choice of non-college bound youth in an evolving technological society.

This research is rooted in the philosophic premise that occupational freedom involves both informed choice of alternatives and competence to work effectively. The economy needs constantly larger numbers of workers possessing new capabilities. But youth can evaluate only those occupational choices that they perceive. They are free to perform only the kinds of work for which they acquire competence.

Choice and acquisition of competence may be needlessly impaired by limited outlooks and motivations. For those reasons, studies of occupational perceptions and aspirations constitute other dimensions of this project.

The objective of our clusters research is to obtain facts about what major types of tasks are actually performed in occupations most likely to provide employment opportunity for substantial percentages of non-college bound youth and to identify major types of knowledge most likely to prepare them for such work. On the basis of Bureau of Labor Statistics projections, the following occupational areas were selected for study: office, general merchandise retailing, building trades, electronics, food services, and child care.

To obtain task and knowledge data for clustering, the staff, in consultation with employers, employees, and vocational teachers, prepared questionnaire check lists designed to identify specific major tasks actually performed by workers in each of the occupational areas listed above.

Questionnaires were designed to obtain from employees data on age, sex, major types of tasks presently performed, length of time on present job, and other types of work done in the past five years.

These questionnaires have been administered to representative samples of workers in each occupational area. To maximize the predictive value of data, questionnaires were administered mainly to employees in modernized leading-edge firms in which the nature of present work is most likely to represent that prevailing in the foreseeable future.

Results provide data on (a) combinations of major task groups of workers presently perform, (b) combinations of major tasks performed on entry jobs, and (c) combinations of tasks generally performed by workers with various degrees of experience, and (d) some data on five-year combinations of worker experience.

From analysis of the above data, we have obtained up-to-date facts about some combinations of major tasks performed by major categories of workers in entry jobs and in positions representing career development opportunities.

Knowledge clusters associated with performance of tasks are in various stages of development, identified by juries of employees, supervisors, and vocational teachers.

Both task and knowledge items are being coded so various patterns of relationships can be identified by computer.

We are identifying (1) some clusters of knowledge useful within each occupational area and (2) some clusters that are commonly useful in two or more areas.

Facts about currently useful tasks and knowledge are being supplemented by studies of ways they will be affected by equipment, processes, and materials now being developed by leading-edge industries.

Objectives

The specific objective of this phase of Project ERD-257-65 is to obtain facts about what major types of tasks are actually performed in major retailing occupations and to identify major types of levels of knowledge most needed to prepare students for such work. Data are coded and processed in ways permitting future identification of retailing knowledges also useful in construction, wholesaling, electronics, office, food service, and non-farm agricultural occupations. To do this we will:

1. Develop a research instrument by which we can identify the major tasks and associated knowledges necessary for successful employment in the merchandising operation of modern retail firms.

2. Analyze the knowledges necessary to perform the major tasks in the retail field in order to identify clusters of concepts common to all the vocational fields and conversely to isolate those concepts unique to the field studied.

Hypotheses

1. There is a body of knowledge common to performance of a wide range of tasks commonly classified within major categories of retailing work.

2. There are differences in levels of knowledge essential for specific task performance for supervisory and non-supervisory personnel.

3. There are some differences in the types and levels of knowledge essential for successful employment in large, medium and small stores.

Limitations

This study is limited to an analysis of the types and levels of knowledges essential to perform the major tasks normally associated with the merchandise category of stores, specifically; SIC 531,department stores; SIC 533, limited price variety stores, and SIC 539, general merchandise stores.[1]

The study is further limited to a study of tasks performed by non-supervisory and supervisory employees. Work done by management personnel is excluded.

Operational Definitions

TASK: A task is conceived as an activity constituting a distinct and necessary part of the work done by an employee. It is a work unit involving specific acts, procedures, techniques and judgments. A task may involve any one or more of the above elements. It may be physical, such as pulling and lifting, or it may be mental, such as selecting, arranging, computing, explaining. It may involve combinations of physical and mental work. Some tasks involve changing the nature of materials; others involve only arrangement of materials. Each task has certain distinguishing characteristics:

1. It is recognized, usually, as being one of the worker's principal responsibilities.

2. It occupies a significant portion of the worker's time.

3. It involves work operations which utilize closely related skills and knowledges.

4. It is performed for some purpose, by some method, according to some standard with respect to speed, accuracy, quality, or quantity. This standard

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[1] Studies of knowledges essential for employment in a broad range of distributive jobs are currently being conducted at the University of Washington. Virginia Polytechnic Institute is studying major tasks in the general merchandise retail field other than those normally associated with the merchandising division. These projects have been coordinated to avoid overlap on initial exploratory studies.

may be derived by the worker himself as a result of experience; or it may be set by managers and supervisors in forms of oral, written, or graphic instructions.

Tasks or duties may be considered major or minor, depending on the percentage of total work time involved in their performance. Their simplicity or complexity can be measured in terms of differences in the levels of skills, knowledge and judgment involved.[2]

NON-SUPERVISORY EMPLOYEE: An non-supervisory employee is anyone concerned with the actual performance of the tasks constituting major portions of work in retail stores (selling, customer service, stockkeeping, promotion activities, clerical functions, etc.). He may perform routine tasks or perform limited supervisory functions.

SUPERVISOR: A "supervisor" is a classification of general merchandise retailing employees. He is one who spends over 50 per cent of his time in managerial work. He must be in charge of, and have as his primary duty, the management of a recognized unit which has a continuing function.

He customarily and regularly supervises at least two full-time employees or the equivalent. He has authority to effect or recommend employment, dismissal, promotion or transfer of the employees he supervises. He regularly and customarily exercises discretionary powers.

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[2] "Defining the Terms Executive . . . Administrative . . . Professional . . . Outside Salesman," Washington: Regulations and Interpretations of the Code of Federal Regulations, Title 29, Part 541, WHPC Publication 1029, U.S. Government Printing Office, May 19, 1965.

STANDARD INDUSTRIAL CLASSIFICATION: "The Standard Industrial Classification was developed for use in the classification of establishments by types of activity in which engaged; for purposes of facilitating the collection, tabulation, presentation, and analysis of data relating to establishments; and for promoting uniformity and comparability in the presentation of statistical data collected by various agencies of the United States Government, state agencies, trade associations, and private research organizations."[3] These classifications are widely used for reporting distributive education enrollments in categories congruent with those used by the Census of Business.

"SIC 531--Department Stores--Establishments normally employing twenty-five people or more and engaged in selling some items in each of the following lines of merchandise: (1) Furniture, home furnishings, appliances, radio and TV sets; (2) A general line of apparel for the family; (3) household linens and dry goods.

"SIC 533--Limited Price Variety Stores--Establishments primarily selling a variety of merchandise in the low and popular price ranges such as stationary, light hardware, toys, housewares, confectionery. These establishments frequenty are known as 'Five and Dime' stores.

"SIC 539--General Merchandise Stores--Establishments primarily selling household linens and dry goods, and/or a combination of apparel, hardware, homewares or home furnishings and other lines in limited amounts. Establishments which meet the criteria for department stores, except as to employment, are included in this classification. Also including Dry Goods Stores (establishments primarily selling sewing and knitting supplies and yarn or any combination of these commodities)."[4]

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[3] Standard Industrial Classification for Use in Distributive Education, Washington: U.S. Government, Department of Health, Education, and Welfare, OE-83013, 1964, p. iii.

[4] *Ibid.*, p. 3.

Review of Related Research

A paper presented by the American Institutes for Research suggests some first steps in vocational analysis.[5] The Institute outlines seven steps required to formulate sets of topic objectives and course objectives. These objectives will be derived from statements of performances actually required for specific jobs constituting job families.

Wesley L. Face and Eugene R. Flug[6] have recently developed a set of concepts that can serve as a framework for Industrial Arts instruction. Their approach is adapted to serve as a framework for this study.

Several previous studies are germane to the method utilized for this study. Doris Anita Berry developed a model for vocational curriculum research with her study of "The Role of Office Practice Instruction in the Training for General Office Assignments."[7] She developed job descriptions for nineteen major general office jobs from information provided by employers and personnel managers and tested the validity of these descriptions by interviews with employees. As a result of inconsistencies found between accepted descriptions of the role of general office employees and what they actually do in performance of their tasks, extensive revision was suggested for the office occupations curriculum.

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[5] "Some Suggestions Concerning First Steps in Vocational Analysis," Pittsburg: American Institutes for Research, Institutes for Performance Technology, (Project ABLE), February 5, 1965.

[6] Wesley L. Face and Eugene R. Flug, "Development of a Conceptual Framework for the Teaching of Industrial Arts," Menomonie, Wisconsin: Stout State University, Cooperative Research Project No. 5--66, January, 1965.

[7] Doris Anita Berry, "The Role of Office Practice Instruction in the Training for General Office Assignments," unpublished Doctoral dissertation, Indiana University, 1963, 280 pages.

Lucy C. Crawford is currently studying the technical content competencies essential for teachers of distributive education.[8] Her research design indicates an analysis of competencies needed for entry jobs and for advancement.

Other studies pertaining to the work of retail personnel by Folley,[9] Rhulow,[10] Routson,[11] and Goldberg,[12] offer data on the knowledges necessary for success in retailing occupations.

Peter G. Haines, et. al., studied the knowledge and competencies needed by teachers of distributive subjects.[13] Textbooks, course syllabi and instructional materials were analyzed to ascertain content commonly taught in distributive education classes. Judgments of distributive teacher educators regarding the relative importance of content items were obtained.

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[8] Lucy C. Crawford, "A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education," mimeographed paper describing research in progress presented at American Vocational Association Convention, Miami, December 8, 1965.

[9] John D. Folley, Jr., "Development of a List of Critical Requirements for Retail Sales Personnel from the Standpoint of Customer Satisfaction," unpublished Masters' thesis, University of Pittsburgh, 1953.

[10] D. H. Rhulow, "Training Department Store Employees," unpublished Masters' thesis, University of Nebraska, 1961.

[11] Jack Craig Routson, "An Observational Analysis of Functional Performance of Retail Sales Personnel," unpublished Doctoral dissertation, University of Illinois, 1964.

[12] Herbert B. Goldberg, "Job Performance Evaluations at R. H. Macy and Company," unpublished Doctoral dissertation, New York University, 1962.

[13] Peter G. Haines, et. al., "Technical Content Competencies Needed by Teachers of the Distributive Subjects," National Business Education Quarterly, Vol. 32, No. 2, Winter 1964-65, 38-50.

Mahoney, et. al., developed a procedure for measuring management performance.[14] Findings derived from that study are not directly related to this one. However, the technique described for the collection of work descriptions and identification of patterns of performance has direct application.

Schultz and Siegel have attacked the analysis of job performance by multidimensional scaling techniques.[15] Palmer and McCormick have analyzed the values and limitations of factor analysis as a job analysis technique.[16] The results of both studies tend to support the view that work activities can be identified and the variety of human work activities may be conceptualized with greater simplicity and economy in terms of cluster. Examples of these techniques are found in Chalupsky's study of clerical jobs,[17] and in Denton and Prien's study of purchasing personnel functions.[18] These studies have aided in formulation of the technique utilized for this study.

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[14] Thomas A. Mahoney, et. al., Development of Managerial Performance . . . A Research Approach, Monograph c-9, Southwestern Publishing Co., Chicago, January, 1963.

[15] Douglas G. Schultz and Arthur I. Siegel, "The Analysis of Job Performance by Multidimensional Scaling Techniques," Journal of Applied Psychology, 1964, Vol. 48, No. 5, 329-335.

[16] George J. Palmer, Jr. and Ernest J. McCormick, "A Factor Analysis of Job Activities," Journal of Applied Psychology, 1961, Vol. 45, No. 5, 289-294.

[17] Albert B. Chalupsky, "Comparative Factor Analysis of Clerical Jobs," Journal of Applied Psychology, 1962, Vol. 46, No. 1, 62-66.

C. S. Brigman, et. al., in a study of salesmanship, examined use of the critical incident technique.[19] To be critical, an incident must occur in a situation where its consequences are sufficiently definite to leave little doubt concerning its effects. Essentially, the procedure is to obtain first-hand reports, or reports from objective records, of satisfactory and unsatisfactory execution of the task assigned. The cooperating individual described a situation in which success or failure is determined by specific reported causes.

Lucy C. Crawford reviewed applications of numerous occupation analysis techniques.[20] She analyzed concepts of "competencies" as an approach to distributive education curriculum development. She recommends that approach as a promising means of improving instruction.

METHOD

Development of Tasks and Knowledges Instrument

Recent job descriptions and training manuals from major retail firms were obtained and analyzed. Related conceptual and methodological research was examined. Training department personnel of leading-edge retail firms were interviewed to conceptualize the tasks and knowledges involved in major categories of work in retail stores. Major work categories were conceptualized as: selling, stockkeeping, cashiering, receiving--marking merchandise, display, advertising, delivery, record keeping, pricing, buying, controlling merchandise, and customer relations.

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[18] J. C. Denton and Erich P. Prien, "Defining the Perceived Functions of Purchasing Personnel," Journal of Applied Psychology, 1963, Vol. 47, No. 5, 332-338.

[19] C. S. Brigman, et. al., "Salesmen Helped by Bringing Out Jobs' Critical Incidents," Personnel Journal, 36:411-14, April, 1958.

[20] Lucy C. Crawford, "Review of Research and Literature on the Competency Pattern Approach to Curriculum Construction or Revision for Distributive Teacher Education," an independent master's degree paper, University of Minnesota, Minneapolis, 1964, pp. 27-35.

Initially, an interview assessment instrument was structured to assist trained interviewers in assessing responses in terms of the frequencies with which various types and levels of knowledges are utilized by non-supervisory and supervisory personnel. Levels of knowledge were conceived and classified in terms derived from Bloom's _Taxonomy of Educational Objectives, Cognitive Domain_.[21] Those terms were "application," "comprehension" and "understanding."

Over 300 activities involved in performance of the twelve major tasks were conceptualized. For response checking, items were arranged in vertical columns under headings signifying each major task.

Knowledge items hypothetically associated with task performance were conceptualized and arranged for response checking in vertical columns to the right of the columns listing tasks. The original interview design sought employees' judgments about whether they used a knowledge "frequently," "rarely" or "never."

A set of examples of knowledge elements structured at the three levels of knowledge was developed. A pattern of criterion questions designed to test consistency of response in terms of levels of knowledge was built into the assessment instrument and a field study was designed to evaluate the instrument.

Four interviewers used the instrument in interviews with fourteen employees and supervisors.

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[21] Benjamin S. Bloom, et. al., _Taxonomy of Educational Objectives, Cognitive Domain_, New York: David McKay Company, Inc., 1956.

Field tests of the original instrument revealed that interviewees had difficulty distinguishing between the terms "frequently," "rarely," "never." Still fewer could distinguish between the meanings of the terms "application," "comprehension" and "understanding."

At that point effort to obtain employee judgments in terms of the Bloom concepts was abandoned. But the instrument and interview procedures were revised, substituting the phrases "need to know" and "do not need to know" for "frequently," "rarely" and "never." Again few interviewees indicated ability to make reasonably firm distinctions.

Since the ultimate goal of the research is curriculum development, up-to-date facts about major tasks and associated activities performed by substantial percentages of employees were deemed essential. Such facts can then be analyzed in terms of the types and levels of knowledges essential to satisfactory task performance.

Consequently, the instrument was redesigned to obtain facts about the frequency with which non-supervisory and supervisory categories of employees perform various combinations of tasks.

Field Testing

The instrument was field tested to (a) establish a basis for validation, (b) identify items that should be added or deleted,(c) test effective distribution and collection methods.

The instrument was sent to a random selection of 212 employees of firms in the three SIC classifications covered by the study. Fifty-eight employees returned questionnaires.

To test the validity of responses interviews were arranged with a random selection of those who returned questionnaires. Again, criterion questions selected from within each major task area and questions on the personal data sheets were used in the interviews.

Comparison of responses obtained by the two procedures indicated substantial agreement and consistency. It was concluded that responses to the questionnaire provided reliable information.

The questionnaires returned and the follow-up interviews indicated a need for clarification of the designation supervisory personnel. Therefore, four items (job title, number of employees supervised, title of immediate supervisor and major tasks performed) were included in the personal data sheets.

The interviews also indicated that the questionnaire was too long and that it included unanswerable questions because some major tasks were supervisory by definition. Therefore, the instrument was separated into two forms, one for non-supervisory employees and one for supervisors.

The personal data questions were the same on both forms. Five of the major tasks common to both categories of employment are included in both forms. Where a task, (i.e., buying, selling, stock control) is unique to one category of employment only representative items are included in the other questionnaire. Thus, data remains sufficient for comparisons of tasks performed by non-supervisory and supervisory employees.

The Sample

The total population of this study is all employees in all stores in SIC 531, department stores; SIC 533, limited price variety stores; and SIC 539, general merchandise stores. A parent population of all such stores in King and Pierce Counties, Washington, was identified. This metropolitan area, which includes the cities of Seattle and Tacoma, was chosen because it closely resembles the national population in terms of percentage of stores, size of stores, and percentages of employees in each SIC category selected. (See APPENDIX B)

In the United States as a whole, general merchandise payrolls constitute 15.1 per cent of all retail payrolls. In Washington State the corresponding figure is 15.3.[22] In the United States the number of general merchandise establishments is 3.6 per cent of all retail establishments. The corresponding percentage in Washington is 3.1.[23]

The number of employees in retail trade in the general merchandise field was also comparable. In the United States it was 17.5 per cent and 16.7 per cent for Washington.[24]

Sixty-two per cent of the retail sales in the general merchandising retail field in the state of Washington were made in King and Pierce counties.[25]

Data showing types of establishments employing various numbers of employees during July, August, and September, 1965 were used. Data for those months was selected because it shows the least fluctuation due to temporary employment. Weighted sampling rates for firms and for employees were established.

In order to establish the sampling rate for firms and to determine the number of firms to be sampled, three strata, (SIC 531, SIC 533, and SIC 539) of stores were designated with a differing sampling rate from stratum to stratum. Then a second stage was designated with a differing sampling rate for employees in each strata. The result was a stratified disproportionate two-stage cluster sample selected with unequal sampling rates in the second stage.

Since the stores were originally selected with sampling rates differing from stratum to stratum (disproportionate stratified sampling), it was possible to design the sample to yield self-weighting estimates of population parameters. This procedure was preferred because the sample data yield either unbiased or slightly biased, but consistent, estimates of population without complicated sets of stratum and cluster weights. The total procedure is described technically as a stratified disproportionate two-stage cluster sample selected with unequal sampling rates in the second stage. The steps followed in making the sample are described in *Sampling and Statistics Handbook for Surveys in Education*.[26]

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[22] Omer L. Carey, et. al., Trends in Distribution, Services, and Transportation, Pullman, Washington: Washington State University, Economic and Business Studies, Bulletin Number 41, 1966, p. 70.

[23] Ibid., p. 69.

[24] Ibid., p. 68.

[25] Ibid., p. 78.

Thirty-three out of 234 firms, and 900 out of 13,643 employees were sampled.

TABLE II

DATA USED IN SELECTING A STRATIFIED DISPROPORTIONATE TWO-STAGE CLUSTER SAMPLE OF EMPLOYEES IN SIC 531, SIC 533, AND SIC 539, IN KING AND PIERCE COUNTIES, WASHINGTON, JULY, 1965

SIC	Firms	No. Firms Smpld.	Sampling Rate for Firms	Emp. (Est.)	Sampling Rate for Emp.	No. of Emp. Smpld.	Prob. of Selecting a Particular Employee
531	37	8	0.21	11,516	.33	760	.066
533	81	10	0.13	1,164	.50	77	.066
539	116	15	0.13	963	.50	63	.066
TOTALS				13,643		900	

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[26] *Sampling and Statistics Handbook for Surveys in Education*, Washington; Research division of the National Education Association, 1965, pp. 390-395.

Table II is the model used for determining the number of employees sampled and the probability of selecting a particular employee in each strata. It is a theoretical model based on a population of employees estimated from data which listed employment in all divisions of the firms for July, August, September, 1965. The actual number of employees sampled in each strata (SIC 531 = 708; SIC 533 = 59; SIC 539 = 80; Total = 847) reflects adjustment to the actual employment data found in the field at the time the survey was taken.

Variables

The major variables are the tasks performed in each of the three standard industrial classifications by non-supervisory and supervisory employees.

Possible contaminating variables which may affect the tasks performed and the type and levels of knowledge needed for task performance have been identified and, where no control can be established through design of the study, descriptions of the extent of the variable are abstracted from data gathered from the employee profile sheets attached to the questionnaire.

Analysis of the Data

The significance of the difference in returns between the three strata will be tested by the formula for the test between two independent proportions.[27]

Tests of the differences between proportions of yes responses between standard industrial classifications and between non-supervisory and supervisory personnel will be made by the procedures outlined by Ferguson.[28]

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[27] George A. Ferguson, *Statistical Analysis in Psychology and Education*, New York: McGraw-Hill, Inc. Second Edition, 1966, p. 177.

[28] *Ibid*. p. 178.

Distribution and Collection of Questionnaires

SIC 531, DEPARTMENT STORES

Eight of the thirty-seven stores in this classification were randomly selected from an alphabetical list of all stores. In each of the eight stores, one-third of the employees in the merchandising division were selected by a systematic random sampling process from an alphabetical listing provided by the employer.

With endorsements of local Chambers of Commerce the author personally contacted managers or personnel directors by mail. (See APPENDIX C) The background and purposes of the project was explained. A responsible coordinator within the firm was assigned to assist in selecting the sample, distributing and collecting completed questionnaires and any necessary follow-up.

The first employee selected on the alphabetical listing was chosen by assignment of a pre-selected random number from a set 1-3. Then a stratified random sample was completed by selecting every third employee within the merchandising division. Numbered questionnaires were distributed to each selected nonsupervisory employee (white form, see APPENDIX F), and each selected supervisor (blue form, see APPENDIX G). Coordinators were provided check sheets designed to facilitate check off of completed questionnaires. At this point responsibility for distribution, collection and transmittal of questionnaires to the researcher was entirely the responsibility of the in-store coordinators. Where necessary, the researcher made follow-up phone calls.

Supervisory level personnel were identified by the store personnel department and supervisory (blue) forms were administered to them. The accuracy of these selections was later verified by checking responses to items 2, 16, 17, and 18 on the personal data sheets attached to the questionnaires. (See APPENDIX F)

All eight stores identified by the original random selection agreed to participate. The actual number of employees, 4,788, as of June, 1966, and the number employed in the merchandising division, 2,196, were listed for comparison with our estimated population of 5,040 employees. (See table III, APPENDIX H for the number of employees by firms.) A total of 562 employee level and 146 supervisory level forms were distributed in SIC 531, Department Stores.

SIC 533, VARIETY STORES AND SIC 539, GENERAL MERCHANDISE STORES

Ten of the 81 firms in SIC 533 and fifteen of the 116 firms in SIC 539 were randomly selected from an alphabetical list of all stores in these strata of the population. In each store one-half of the employees were selected by a stratified random sampling process from an alphabetical listing provided by the employer.

The manager was contacted by one of four trained interviewers, each assigned to cover specific firms. A letter describing the research, seeking assistance from the management and introducing the interviewer as a member of the University's research staff preceded the scheduled meeting. (See APPENDIX C)

To distribute questionnaires to SIC 533 and SIC 539 stores, our distributive education coordinators from high schools and junior colleges in the Seattle and Tacoma area served as interviewers. They participated in a four-hour training project designed to teach them appropriate procedures for gaining management cooperation, randomly sampling within firms, administration and collection of questionnaires, and follow-up.

Each interviewer was given a packet containing a brief statement of the purposes of the project (See APPENDIX D), a set of detailed instructions for selection of store samples (See APPENDIX E) and for distribution and collection of the forms.

The first employee selected on the alphabetical listing was chosen by assignment of a pre-selected random number. Then a stratified random sample was completed by selecting every other employee performing functions normally assigned the merchandising division. (See APPENDIX E, Instructions for interviewers) Numbered questionnaires were distributed to each selected non-supervisory employee (white form) and to each supervisor (blue form) either by the interviewer or by the manager. The interviewer then either waited for the completed forms or else returned the same day to pick them up. In cases where the selected person was not on-the-job, a later call was made.

Forty-eight non-supervisory level and eleven supervisory level questionnaires were distributed to the ten selected stores in SIC 533.[29]

Comparison was made between the estimated number of employees (280) as of July, 1965, which included employees in all divisions, the total number employed as of June, 1966 (201) when the survey was taken and the number (114) performing tasks normally associated with the merchandising division.

Sixty-two non-supervisory level and eighteen supervisory level questionnaires were distributed to the fifteen selected stores in SIC 539.[30] The same procedures as used in SIC 533 were used for selection of the employees sampled. (See Table III, APPENDIX H)

A total of 672 non-supervisory level and 175 supervisory level questionnaires were distributed to all strata.

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[29] One firm of the original ten selected in SIC 533 from the master list of firms dated July, 1965, was no longer in operation. One firm declined to cooperate in the survey. Therefore, the next firms on the random order list were selected.

[30] One firm of the original 15 selected in SIC 539 from the master list of firms dated July, 1965, was no longer in operation. Two firms were scratched because they employed no personnel at the time the sample was taken. One firm agreed to participate, but after the questionnaires remained on the employer's desk during four days the interviewer picked them up on his second follow-up call. In each case the next firm on the random order list was selected.

Returns were checked off on the original distribution list. Follow-up procedures were pursued by the in-store coordinators.

Returns

Six hundred, eighty-eight (81 per cent) of the questionnaires distributed were returned. (See Table III, APPENDIX H)

Seventy-nine of the returned questionnaires were unusable.

NUMBERS AND PER CENTS OF QUESTIONNAIRES DISTRIBUTED AND RETURNED (BY STANDARD INDUSTRIAL CLASSIFICATION)*

	Non-Supervisor			Supervisor			Total		
	No. Distributed	Returned		No. Distributed	Returned		No. Distributed	Returned	
		#	%		#	%		#	%
SIC 531	562	440	.78	146	114	.78	708	554	.78
SIC 533	48	46	.95	11	11	1.00	59	57	.97
SIC 539	62	59	.95	18	18	1.00	80	77	.96
TOTAL	672	545	.81	175	143	.82	847	688	.81
less non-usable returns		61			18			79	
TOTAL	672	484	.72	175	125	.71	847	609	.72

*Abstracted from Table III, Appendix H.

Twelve non-supervisory level (white) forms were not usable because the respondent met the three criteria that were selected to define a supervisor. Similarly, one supervisory level (blue) questionnaire was eliminated because the respondent could not meet the criteria as a supervisor. Since only those responses in the five major task areas common to both categories would be usable, the thirteen returns were withdrawn from the sample and segregated for separate analysis outside the context of this study.

Thirty-seven employee and twelve supervisory returns were by individuals not in the merchandising division. The orientation of the questionnaire to the major tasks normally performed in the merchandising division precluded all but sporadic responses by these subjects. The majority were office and food service personnel.

A total of 609 (72 per cent) usable forms are the basis for the findings that follow.

RESULTS

Basic data on the tasks performed by general merchandise retail personnel are presented in Table IV and Appendix I. These frequency counts and percentages are abstracted from the initial computer runs of the questionnaire responses. Only limited analysis of the data has been made. Further detailed analysis of the findings of the study will await completion of the knowledge assessment now in progress.

Facts presented in Appendix I provide a profile of the workers in terms of occupational training, education, sex, age, experience in present occupation, job mobility, emphasis of high school study and groupings of major tasks performed. Data shows variations in the frequency with which supervisory and non-supervisory employees commonly perform major types of retailing tasks in three classifications of stores. This information will be useful in identification of knowledges most likely to provide bases for training and career-long advancement.

TABLE IV

PERCENTAGES OF EMPLOYEE AND SUPERVISORY RESPONDENTS REPORTING PERFORMANCE OF TASKS BY STANDARD INDUSTRIAL CLASSIFICATION IN THE GENERAL MERCHANDISE RETAIL FIELD (JUNE, 1966)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
SELLING	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
1. Greet the customer and determine wants and needs	372	95	33	87	54	98	459	95								
2. Package merchandise	315	81	27	71	42	76	384	79								
3. Direct customers to other departments and work interdepartmental sales	313	80	30	79	48	87	391	81								
4. Help customer handle or try on merchandise	320	82	31	82	45	82	396	82								
5. Determine amounts of credit charges or layaway charges	188	48	18	47	34	62	240	50								
6. Receive stock from supplies or delivery man	229	59	27	71	43	78	299	62								
7. Hear and handle complaints or refer to supervisor	352	90	31	82	51	93	434	90								
8. Suggest additional or related items for sale	351	90	32	84	52	95	435	90								
9. Fill out mail orders and catalog orders	208	53	9	24	17	31	234	48								
10. Use company advertising in selling	270	69	23	61	40	73	333	69								
11. Take phone orders and sell by telephone	342	88	16	42	37	67	395	82								
12. Make written forms and reports to supervisor	114	29	12	32	24	44	150	31								
13. Train new sales people	177	45	16	42	29	53	222	46								
14. Prepare daily report forms	153	39	10	26	15	27	178	37								
15. Explain care of merchandise and demonstrate its uses	291	74	22	58	43	78	356	74								

*SIC 531, Department Store; SIC 533, Limited Price Variety Store; SIC 539, General Merchandise Store.

Note: All percentages are rounded to the nearest whole per cent.

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
16. Prepare merchandise for layaway	287	73	29	76	38	69	354	73								
17. Translate product knowledge into customer benefits	319	82	28	74	45	82	392	81								
18. Write merchandise return tickets	307	79	21	55	42	76	370	76								
19. Return merchandise to its proper place in stock	336	86	29	76	51	93	416	86								
20. Replenish floor stock from reserve stock	329	84	32	84	50	91	411	85								
21. Write up orders for routine reorders of merchandise from basic stock list	140	36	26	68	29	53	195	40								
22. Supervise sales personnel	99	25	5	13	19	35	123	25								
23. Arrange stock in selling area and keep record of amounts and variety on hand	257	66	28	74	40	73	325	67								
24. Study literature relating to a product	329	84	27	71	46	84	402	83								
25. Approve and accept checks	214	55	22	58	48	87	284	59								
26. Evaluate customers' wants and needs	347	89	28	74	50	91	425	88								
27. Serve more than one customer at a time during rush periods	339	87	29	76	54	98	422	87								
28. Follow up of sales to insure customer satisfaction and sell additional items	309	79	28	74	47	86	384	79								
29. Cover counters and garments at night	47	12	7	18	17	31	71	15								
30. Demonstrate merchandise	240	61	19	50	40	73	299	62								
31. Point out hidden values of merchandise	331	85	29	76	48	87	408	84								
32. Keep customer records in order to build up a clientele or following	180	46	7	18	21	38	208	43								
33. Use trade-ups with customers	225	58	26	68	22	40	273	56								
34. Gift wrap packages	152	39	17	45	14	26	183	38								
35. Use sales register and handle monies	341	87	32	84	52	95	425	88								
36. Process merchandise returns and exchanges	304	78	27	71	50	91	381	79								
37. Reticket merchandise	251	64	29	76	51	93	331	68								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
38. Schedule hours and duties of other salespeople	48	12	4	11	13	24	65	13								
39. Assist customers in decision making	356	91	33	87	52	95	441	91								
40. Write sales tickets	342	88	28	74	50	91	420	87								
41. Confer with supervisor on selling problems	331	85	28	74	49	89	408	84								
42. Use a variety of techniques to close sales	326	83	26	68	42	76	394	81								
43. Count and record till and deposit money with cashier	287	73	24	63	27	49	338	70								
44. Maintain stock control records	148	38	13	34	20	36	181	37								
45. Make competitive shopping trips to other stores	124	32	14	37	21	38	159	33								
46. Check stock for damaged or soiled merchandise	293	75	31	82	45	82	369	76								
47. Construct departmental merchandise display	192	49	21	55	38	69	251	52								
48. Relate company policies to all decisions	324	83	28	74	39	71	391	81								
49. Rotate stock to keep first-in merchandise in prime selling position	300	77	30	79	46	84	376	78								
50. Order and replenish departmental supplies	210	54	23	61	33	60	266	55								
51. Keep counters and fixtures clean and in order	345	88	33	87	51	93	429	87								
KEEPING AND COUNTING STOCK																
52. Keep counters and display fixtures clean and attractive	331	85	33	87	50	91	414	86								
53. Arrange stock for counting	295	75	30	79	47	86	372	77								
54. Inform responsible person when stocks are low	335	86	32	84	51	93	418	86								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
55. Arrange understock and reserve stock	275	70	31	82	45	82	351	73								
56. Re-mark merchandise for special sales events	191	49	27	71	47	86	265	55								
57. Prepare rejected merchandise for return to supplier	179	46	16	42	39	71	234	48								
58. Unpack and assemble merchandise	236	60	18	47	47	86	301	62								
59. Record price of item on proper type ticket	177	45	20	53	45	82	242	50								
60. Record sales on unit control records	117	30	6	16	19	35	142	29								
61. Arrange selling stock	313	80	29	76	47	86	389	80								
62. Prominently display volume sellers at key traffic points	267	68	21	55	38	69	326	67								
63. Multiply and extend figures	164	42	16	42	30	55	210	43								
64. Correspond with suppliers about adjustments on merchandise received	54	14	6	16	27	49	87	18								
65. Prepare stock reports for management	117	30	12	32	29	53	158	33								
66. Prepare merchandise for sales floor	232	60	19	50	45	82	296	62								
67. Maintain stock control cards	83	21	11	30	18	33	112	23								
68. Keep stock neatly arranged and in order	322	82	32	84	50	91	404	84								
69. Keep older merchandise moved to front of selling stock	277	71	33	87	45	82	355	73								
70. Add long columns of figures	238	61	20	53	39	71	297	61								
71. Handle computer punch tickets	48	12	9	24	3	6	60	12								
72. Collect information, obtain fact and ideas, and present them in clear, logical order	140	36	16	42	30	55	186	38								
73. Schedule stock counts	76	19	9	24	19	35	104	22								
74. Count and record stock	255	65	22	58	36	66	313	65								
75. Fill salesmen's order for stock for delivery	62	16	7	18	18	33	87	18								
76. Replenish selling stock from reserve stock	294	75	29	76	47	85	370	76								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
77. Deliver packaged merchandise to store exit for customer pickup	171	44	10	23	34	62	215	44								
78. Order special merchandise from catalog	122	31	13	34	29	53	164	34								
OPERATING CHECKSTAND AND SALES REGISTER																
79. Greet customers	339	87	31	82	54	98	424	88								
80. Record charge sales	294	75	16	42	44	80	354	73								
81. Package merchandise	309	79	30	79	50	91	389	80								
82. Figure daily sales register tally	254	65	16	42	20	36	290	60								
83. Prepare technical reports	61	16	6	16	12	22	79	16								
84. Use communications equipment: telephone, teletype, dictation equipment, loudspeaker, etc.	270	69	18	47	48	87	336	69								
85. Receive checks from customers	322	82	22	58	50	91	394	81								
86. Accept and process merchandise returned by customers	298	76	27	71	50	91	375	78								
87. Record stock numbers of items sold on the sales register	114	29	8	21	21	38	143	30								
88. Record cash sales	248	63	20	53	34	62	302	62								
89. Record C.O.D. sales	216	55	4	11	23	42	243	50								
90. Handle received on account and paid out transactions	109	28	10	26	34	62	153	32								
91. Handle split tickets, punched tickets, and other unit control inventory devices	123	32	15	40	10	18	148	31								
92. Make change	325	83	30	79	50	91	405	84								
93. Use charge plates	336	86	13	34	40	73	389	80								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
94. Gift wrap merchandise	145	37	16	42	16	29	177	37								
95. Check out register at end of day	283	72	21	55	25	46	329	68								
96. Replace sales register tapes	246	63	30	79	38	69	314	65								
97. Get credit department approval on non-routine credit purchases	308	79	16	42	42	76	366	76								
RECEIVING, CHECKING, AND MARKING MERCHANDISE																
98. Receive merchandise from delivery men and common carriers	121	31	17	45	45	82	183	38								
99. Ticket merchandise	125	32	22	58	48	87	195	40								
100. Distribute merchandise to selling floor and reserve stockroom	150	38	15	40	45	82	210	43								
101. Process packing lists	39	10	6	16	29	53	74	15								
102. Work with fractions, decimals, and percentages in determining prices to be marked on merchandise	65	17	15	40	34	62	114	24								
103. Count merchandise and compare it with invoice and buyer's order to insure agreement as to quality, color, size, and style	126	32	16	42	45	82	187	39								
104. Unpack merchandise	173	44	17	45	49	89	239	49								
105. Check condition of merchandise received	196	50	19	50	46	84	261	54								
106. Prepare merchandise for delivery to selling floor	95	24	13	34	46	84	154	32								
107. Correspond with suppliers concerning returns and adjustments	46	12	8	21	26	47	80	17								
108. Prepare right type of ticket with necessary information for each item received	76	19	13	34	37	67	126	26								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
109. Prepare insurance forms on damaged merchandise received	7	2	4	11	9	16	20	4								
110. Report incorrect orders and damaged stock to supervisor	174	45	19	50	40	73	233	48								
111. Keep receiving room tools and equipment in order	30	8	9	24	31	56	70	15								
112. Mark tickets using store's coding systems for prices, stock numbers, and dating	75	19	13	34	37	67	125	26								
113. Keep receiving room clean and orderly	29	7	5	13	32	58	66	14								
114. Determine price to be marked on merchandise from buyer's or merchandise manager's information	53	14	13	34	35	64	101	21								
DELIVERY																
115. Prepare delivery sales tickets	178	46	6	16	20	36	204	42	53	66	59	60	0	0	7	44
116. Figure delivery dates from schedules	121	31	4	11	16	29	141	29	41	51	46	47	0	0	7	31
117. Install delivered goods in home	5	1	2	5	4	7	11	2	6	7	6	6	0	0	1	6
118. Suggest additional related purchases when delivering goods	35	9	6	16	6	11	47	10	16	20	18	18	0	0	2	13
119. Collect on C.O.D. delivery	19	5	2	5	9	16	30	6	10	13	7	7	0	0	6	38
120. Figure postage rates	168	43	2	5	13	24	183	38	50	62	66	53	3	30	7	44
121. Fill in standardized delivery forms	139	36	6	16	15	27	160	33	49	61	52	53	5	50	4	25
122. Prepare and record C.O.D. sales	174	45	3	8	18	33	195	40	39	49	46	47	0	0	3	19
123. Figure delivery cost from schedules	127	33	2	5	14	26	143	30	42	52	47	48	1	10	4	25
124. Figure least expensive routing and carrier on deliveries	45	12	1	3	12	22	58	12	23	29	20	20	2	20	7	44

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
125. Package merchandise and take to delivery department	160	41	7	18	24	43	191	40	56	70	60	61	1	10	9	56
KEEPING ACCOUNTS AND RECORDS																
126. Keep customer credit records of charges and payments	18	5	7	18	19	35	44	9	15	12	4	40	7	44	4	4
127. Prepare sales register stock control tapes for transmittal to computer center	22	6	2	5	5	9	29	6	10	12	0	0	2	13	10	10
128. Compute payroll	11	3	2	5	7	13	20	4	26	33	5	50	8	50	20	20
129. Prepare daily sales sheets by department or employee	76	19	2	5	13	24	91	19	61	76	2	20	7	44	67	68
130. Keep records and copies of store advertisements	38	10	0	0	14	26	52	11	56	70	3	30	10	63	57	58
131. Read and apply tax charts	168	43	17	45	31	56	216	45	50	63	6	60	9	56	48	49
132. Record daily sales in unit control forms	75	19	3	8	11	20	89	18	52	65	5	50	8	50	52	53
133. Collect information and prepare reports in clear, logical manner	52	13	5	13	17	31	74	15	65	81	64	65	7	70	10	63
134. Record and report federal and state taxes	38	10	6	16	11	20	55	11	15	19	9	9	5	50	5	31
135. Record stock count information in proper book	103	26	13	34	17	31	133	28	74	93	75	76	6	60	12	75
136. Figure withholding tax and other deductions	21	5	5	13	9	16	35	7	10	13	4	4	4	40	5	31
137. Record inventory records in proper form	70	18	7	18	18	33	95	20	65	81	62	63	7	70	12	75
138. Take and file customer credit applications and references	29	7	4	11	21	38	54	11	13	16	8	8	2	20	6	38

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 481		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
139. Prepare key punched stock control tickets for transmittal to supplier	16	4	2	5	2	4	20	4	16	20	16	16	4	40	0	0
140. Record receipts and payment in proper amounts	34	9	5	13	20	36	59	12	16	20	9	9	3	30	8	50
141. Record invoice information in proper record forms	28	7	4	11	20	36	52	11	34	42	24	24	5	50	13	81
142. Record time clock data on payroll forms	17	4	2	5	4	7	23	5	30	37	26	26	3	30	8	50
143. Record sales register tapes	40	10	3	8	12	22	55	11	36	45	32	32	5	50	8	50
144. Keep current files of invoices and purchase orders	35	9	3	8	19	35	57	12	66	82	61	62	7	70	14	88
145. Use communications equipment: telephone, teletype, dictation equipment, etc.	172	44	16	42	38	69	226	47	82	103	83	84	6	60	14	88
COMPUTING INFORMATION USING MATHEMATICS SKILLS																
146. Figure fractions and decimals	91	23	18	47	33	60	142	29	70	88	69	70	5	50	14	88
147. Use transportation costs and terms of sale in computing costs of merchandise	35	9	2	5	16	29	53	11	62	77	61	62	6	60	10	63
148. Work with percentages	12	21	19	50	35	64	136	28	85	106	83	84	7	70	16	100
149. Use accounting system based on retail price	19	5	2	5	19	35	40	8	55	69	58	59	4	40	7	44
150. Figure gross margin percentages	22	6	0	0	13	[illegible]	35	7	63	79	61	62	6	60	12	75
151. Use transportation rate schedule	51	13	1	3	9	[illegible]	61	13	36	45	37	37	4	40	4	25
152. Analyze charts and graphs	16	4	1	3	10	18	27	6	41	51	45	46	2	20	4	25

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
153. Figure discounts and datings	114	29	13	34	29	53	156	33	54	68	50	51	5	50	13	81
154. Compute factors which affect gross margin	12	3	1	3	12	22	25	5	55	69	60	61	3	30	6	38
155. Calculate turnover rate	14	4	2	5	13	24	29	6	61	76	61	62	4	40	11	69
156. Compute stock to sales ratios	17	4	0	0	10	18	27	6	56	70	57	58	4	40	9	56
157. Figure cash and trade discounts	65	17	8	21	17	31	90	19	42	53	36	36	5	50	12	75
158. Compute open to buy	17	4	0	0	8	15	25	5	50	63	56	57	2	20	5	31
159. Use formulas for markup and markdown	36	9	6	16	19	35	61	13	74	92	79	80	2	20	11	69
PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS																
160. Clean the store windows	14	4	7	18	29	53	50	10	10	12	3	3	2	20	7	44
161. Prepare or assemble items for display	131	34	20	53	42	76	193	40	78	97	77	78	5	50	15	94
162. Set up departmental displays of sales items	166	43	19	50	38	69	223	46	85	106	87	88	5	50	14	88
163. Select appropriate theme, color scheme, and type of fixture	70	18	12	32	24	44	106	22	54	68	54	55	4	40	10	63
164. Train display personnel	7	2	1	3	9	16	17	4	10	13	5	5	3	30	5	31
165. Schedule displays for department	24	6	2	5	17	31	43	9	61	76	65	66	3	30	8	50
166. Gather merchandise for use in displays, keep records of the items, and return to stock	87	22	11	29	12	46	123	25	66	82	65	66	5	50	12	75
167. Make selling displays	133	34	19	50	37	67	189	39	79	99	80	81	5	50	14	88
168. Dismantle displays and return merchandise to stock	131	34	18	47	37	67	186	38	58	72	55	56	4	40	13	81
169. Coordinate pieces and accessorize merchandise to be displayed	100	28	16	42	30	55	156	32	73	91	72	73	5	50	14	88
170. Plan seasonal display themes	57	15	9	24	20	36	86	18	51	64	45	46	5	50	14	88

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
171. Select time and place for each display	44	11	11	29	22	40	77	16	57	71	55	56	5	50	11	69
172. Dress mannequins for display	64	16	11	29	18	33	93	19	33	41	31	31	4	40	6	38
173. Make departmental signs	32	8	12	32	28	51	72	15	48	60	43	43	3	30	14	88
174. Put up interior store decorations	22	6	13	34	26	47	61	13	23	29	14	14	5	50	10	63
175. Coordinate displays of advertised and featured merchandise	92	24	13	34	29	53	134	28	69	86	66	67	6	60	14	88
176. Purchase supplies for displays	12	3	5	13	17	31	34	7	12	15	5	5	2	20	8	50
177. Develop a display budget	4	1	1	3	7	13	12	3	4	5	2	2	2	20	1	6
178. Design layout of each display	12	3	3	8	17	31	32	7	11	14	7	7	3	30	4	25
179. Make background pieces	14	4	6	16	15	27	35	7	7	9	3	3	3	30	3	19
180. Trim show windows and set up displays	18	5	4	11	19	35	41	9	11	14	5	5	3	30	6	38
181. Dress showcase	55	14	4	11	18	33	77	16	26	33	24	24	3	30	6	38
182. Cover displays at night	15	4	3	8	15	27	33	7	6	8	5	5	0	0	3	18
183. Use and service display equipment (mannequins, sign holders, sign printers, staplers, saws, paint equipment, etc.)	51	13	12	32	28	51	91	19	41	33	28	28	5	50	8	50
PLANNING, PREPARING, AND PLACING ADVERTISEMENTS																
184. Determine consumer demand for store's products	36	9	6	16	16	29	56	12	53	66	51	22	6	60	9	56
185. Secure or prepare illustrations	11	3	1	3	13	24	25	5	22	28	18	18	4	40	6	38
186. Write headlines	5	1	0	0	5	9	10	2	18	23	18	18	0	0	5	31
187. Write radio copy	1	0	0	0	1	2	2	0	2	3	2	2	0	0	1	6
188. Coordinate displays and advertisements	34	9	3	8	15	27	52	11	66	83	69	70	5	50	9	56

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 434		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
189. Evaluate effectiveness of ads in terms of sales	34	9	4	11	22	40	60	12	72	90	75	76	5	50	10	63
190. Plan institutional form for ads designed to establish a store image	4	1	0	0	3	6	7	1	12	15	10	10	1	10	4	25
191. Write newspaper copy	9	2	0	0	5	9	14	3	27	34	25	25	2	20	7	44
192. Use other store display and selling areas in conjunction with advertising	26	7	5	13	14	26	45	9	38	47	36	36	2	20	9	56
193. Supervise work of other employees	20	5	1	3	16	29	37	8	58	73	55	56	7	70	11	69
194. Prepare advertising budget	6	2	0	0	2	4	8	2	12	15	11	11	1	10	3	19
195. Price advertising in various media	5	1	0	0	6	11	11	2	26	32	24	24	2	20	6	38
196. Proofread ads	28	7	1	3	8	15	37	8	69	86	70	71	4	40	12	75
197. Use telephone to advertise	33	8	1	3	7	13	41	9	7	9	7	7	1	10	1	6
198. Train other advertising personnel	1	0	0	0	1	2	2	0	6	8	3	3	1	10	4	25
199. Plan advertising program and schedule	10	3	0	0	4	7	14	3	38	48	41	41	2	20	5	21
200. Make basic layout plans	11	3	1	3	7	13	19	4	28	31	22	22	2	20	7	44
201. Use commercial mat services	7	2	0	0	5	9	12	3	16	20	14	14	2	20	4	25
202. Use various type styles in copy	6		0		3		9	2	10	12	6	6	1	10	5	31
203. Take advertising copy to media for preparation of proof copies	5	1	0	0	3	6	8	2	18	23	17	17	3	30	3	19
204. Keep copies of all ads	32	8	0	0	10	18		9	53	66	54	55	3	30	9	56
BUYING MERCHANDISE FOR RESALE																
205. Determine customer demand	114	29	15	40	29	53	158	33								
206. Analyze selling or operating cost for department, salesperson, line of merchandise, etc.	14	4	3	8	9	16	26	5								
207. Establish price lines for department and prices for individual items	17	4	4	11	12	22	33	7								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
208. Make decisions on hiring, promoting, or firing employees	12	3	2	5	7	13	21	4								
209. Negotiate with vendors on terms and discount procedures	13	3	2	5	10	18	25	5								
210. Compute open to buy amount by department and smaller units	7	2	0	0	8	15	15	3								
211. Go to vendors' shows or to market to make buying decisions	26	7	1	3	12	22	39	8								
212. Shop competitive stores	73	19	10	26	19	35	102	21								
PRICING MERCHANDISE																
213. Determine what factors affect your gross margin	18	5	1	3	15	27	34	7								
214. Determine rate of turnover for item, line, or department and apply results to store situation	25	6	5	13	18	33	48	10								
215. Evaluate and determine rate or amount of trade-ins and premiums on various items	10	3	1	3	7	13	18	4								
216. Apply factors of how the price affects the consumer to the pricing of items	17	4	3	8	16	29	36	7								
217. Use the store's pricing policies in determining price of a product	29	7	9	24	30	55	68	14								
218. Determine markup and markdown	34	9	8	21	29	53	71	15								

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
CONTROLLING MERCHANDISE																
219. Forecast sales for a season/year	23	6	2	5	10	18	35	7								
220. Schedule and conduct inventories	34	9	4	11	14	26	52	11								
221. Match inventory to customer demand	39	10	3	8	18	33	60	12								
222. Determine departmental operating costs or selling costs	10	3	1	3	10	18	21	4								
223. Compute and use turnover figures	17	4	1	3	9	16	27	6								
224. Estimate expenses and price reductions for a season/year	11	3	0	0	7	13	18	4								
225. Use various inventory control systems	38	10	3	8	14	26	55	11								
BUYING MERCHANDISE FOR RESALE																
226. Determine customer demand									83	104	85	86	6	60	13	81
227. Analyze selling or operating cost for department, salesperson, line of merchandise, etc.									58	72	63	64	2	20	7	44
228. Communicate with supplier about returns or adjustments on purchases									84	105	84	85	6	60	15	94
229. Select buying sources									50	62	48	49	3	30	11	69
230. Establish price lines for department and prices for individual items									64	80	65	66	4	40	11	69
231. Handle employee complaints									87	109	90	91	6	60	13	81
232. Keep up on current trends in buying and styles									89	111	91	92	5	50	15	94
233. Sell on floor									92	115	91	92	8	80	16	100
234. Instruct salespeople in new merchandise information									90	113	92	93	6	60	15	94
235. Supervise salespeople									93	118	93	94	8	80	15	94
236. Train new salespeople and stock people									88	110	88	89	7	70	15	94

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
237. Make routine purchase order decisions, i.e., route, type transport, delivery schedule, dating, amounts									73	91	72	73	5	50	14	88
238. Determine markdowns									82	103	82	83	6	60	15	94
239. Make decisions on hiring, promoting, or firing employees									62	78	64	65	5	50	9	56
240. Select and/or buy merchandise for special promotions									67	84	69	70	4	40	11	69
241. Negotiate with vendors on terms and discount procedures									50	62	47	48	3	30	12	75
242. Establish merchandise dating procedure									32	40	29	30	4	40	7	44
243. Make routine reports on employee effectiveness to personnel manager									68	85	74	75	2	20	9	56
244. Use manufacturers' semi-automated price ticket stock count and reorder process on basic stock									41	51	40	40	4	40	7	44
245. Use middlemen in some purchases									57	71	55	56	3	30	13	81
246. Set advertising schedule and budget									33	41	33	33	3	30	5	31
247. Compute open to buy amount by department and smaller units									46	57	53	54	1	10	3	19
248. Keep and invoice inventory control									50	62	52	53	3	30	7	44
249. Go to vendors' shows or to market to make buying decisions									58	72	59	60	3	30	10	63
250. Schedule special promotions									49	61	49	50	3	30	9	56
251. Prepare Purchase orders with transportation rates and schedules									45	61	49	50	3	30	9	56
252. Plan layout of merchandise									74	93	76	77	4	40	13	81

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
253. Make decisions on customer returns and allowances									91	114	92	93	7	70	15	94
254. Set up basic stock schedules for department and set reorder procedure on basic stock									67	84	70	71	5	50	9	56
255. Establish code system for marking merchandise									24	30	23	23	2	20	5	31
256. Order from catalogs									54	67	50	51	5	50	12	75
257. Figure turnover rates by department and by individual items									48	60	53	54	2	20	5	31
258. Supervise inventories									88	110	91	92	6	60	13	81
259. Schedule buying and delivery dates									62	77	64	65	5	50	8	50
260. Shop competitive stores									86	107	91	92	3	30	13	81
261. Schedule employees' work week									78	97	81	82	6	60	10	63
262. Figure stock to sales ratio									55	69	59	60	4	40	6	38
263. Maintain and use a unit control system on special merchandise									66	83	72	73	3	30	8	50
264. Communicate with vendors about adjustments or returns on incorrect orders									82	103	82	83	6	60	15	94
265. Make decisions on quantities, styles, varieties, etc. to buy									81	101	81	82	6	60	14	88
266. Communicate with insurance companies on claims and adjustments									14	18	5	5	4	40	9	56
267. Develop advertising plans									41	51	43	43	3	30	5	31

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
268. Determine department, line, and item markup percentages									59	74	62	61	5	50	8	50
PRICING MERCHANDISE																
269. Use federal and state laws that apply to pricing goods when establishing initial prices									41	51	38	38	5	50	8	50
270. Determine what factors affect your gross margin									65	81	66	67	5	50	10	63
271. Use the law of supply and demand in determining initial **markup**									50	63	49	50	5	50	9	56
272. Work with decimals, fractions and percentages in establishing prices									72	90	70	71	5	50	15	94
273. Consider the costs involved in determining a price for an item									73	91	73	74	5	50	13	81
274. Employ the use of elastic and inelastic demand in pricing decisions									42	52	40	40	4	40	8	50
275. Determine the cost of merchandise sold									60	75	56	57	6	60	13	81
276. Determine rate of turnover for item, line or department and apply results to store situation									57	71	56	57	5	50	10	63
277. Use coding systems in premarking merchandise									37	46	32	32	5	50	9	56
278. Evaluate and determine rate or amount of trade-ins and premiums on various items									15	19	15	15	2	20	2	13

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
279. Analyze the use of trading stamps and their effect on the item's price									5	6	4	4	2	20	0	0
280. Use loss leaders in your promotion and sales policies									27	34	20	20	4	40	10	63
281. Apply factors of how the price affects the consumer to the pricing of items									44	55	43	43	3	30	9	56
282. Use the store's pricing policies in determining price of a good									80	100	82	83	5	50	13	81
283. Determine markup and markdown									75	94	76	77	6	60	12	75
284. Use the principles of monopoly pricing, competitive pricing, judgment pricing, and price lining									54	67	53	54	5	50	9	56
285. Use manufacturers' pre-priced merchandise in determining prices									65	81	65	66	5	50	11	69
286. Use markup and markdown formulas									71	89	77	78	3	30	9	56
287. Figure open to buy									49	61	55	56	1	10	5	31
CONTROLLING MERCHANDISE																
288. Forecast sales for a season/year									60	75	64	65	5	50	6	38
289. Determine current sales trends									70	88	72	73	6	60	10	63
290. Use computers in figuring and analyzing inventory									9	11	9	9	1	10	1	6
291. Schedule and conduct inventories									73	91	77	78	7	70	7	44

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
292. Match inventory to customer demand									65	81	67	68	4	40	10	63
293. Use ratios in determining selling cost factors									44	55	48	49	3	30	4	25
294. Employ a pattern for the placement of merchandise on shelves									80	100	82	83	6	60	12	75
295. Determine open to buy									50	62	54	55	3	30	5	31
296. Make sales forecasts (based on multiple control factors)									44	55	47	48	3	30	5	31
297. Maintain open to buy records									50	63	57	58	3	30	3	19
298. Use purchase request forms									62	78	66	68	3	30	9	56
299. Maintain adequate inventory of most-wanted stock items									86	108	86	87	7	70	15	94
300. Use split ticket system for reporting sales									38	48	46	47	2	20	0	0
301. Determine departmental operating costs or selling costs									47	59	50	51	2	20	7	44
302. Train stock keepers									57	72	59	60	4	40	9	56
303. Make up basic stock and routine reorder schedules									66	83	69	70	3	30	11	69
304. Compute and use turnover figures									44	55	47	48	2	20	6	38
305. Use unit inventory control systems including periodic and perpetual count systems									74	92	78	79	5	50	9	56
306. Estimate expenses and price reductions for a season/year									35	44	38	38	3	30	3	19

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	%	#	#	%	#	%	#	%
307. Use dollar inventory control system									54	67	58	59	4	40	5	31
308. Prepare computer punch tickets for trnasmittal to supplier or computer center									15	19	15	15	4	40	0	0
309. Control losses through markdowns									79	99	82	83	7	70	10	63
310. Employ a pattern for arranging selling stock, understock, reserve stock									87	109	88	89	7	70	14	88
311. Use invoice inventory control system									45	56	49	50	2	20	5	31
312. Prepare sales register inventory tapes for transmittal to computer center									18	22	19	19	1	10	2	13
SELLING																
313. Complete the personal selling process									82	102	79	80	8	80	15	94
314. Interpret store policies to customers and salespeople									95	119	95	96	8	80	16	100
315. Supervise and train sales personnel									88	110	89	90	6	60	15	94
316. Handle routine stockkeeping functions									88	110	84	85	10	100	16	100
317. Operate and service the cash register									74	93	69	70	8	80	16	100
KEEPING AND COUNTING STOCK																
318. Arrange and keep stock									86	108	84	85	9	90	15	94

TABLE IV (Continued)

	NON-SUPERVISOR								SUPERVISOR							
	N = 391		N = 38		N = 55		N = 484		N = 125		N = 99		N = 10		N = 16	
	531*		533*		539*		Total		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
319. Prepare stock for special sales events									87	109	88	89	9	90	15	94
320. Record sales on unit control records									60	75	62	63	6	60	7	44
321. Prepare merchandise for sales floor									79	99	79	80	6	60	14	88
322. Handle computer punch stock control tickets									26	33	26	26	7	70	0	0
323. Count and record stock									80	100	80	81	6	60	14	88
RECEIVING, CHECKING, AND MARKING MERCHANDISE																
324 Receive merchandise and prepare for pricing									34	43	22	22	6	60	15	94
325. Check condition of merchandise received and handle required related correspondence									62	77	54	55	8	80	15	94
326. Prepare price tickets with necessary information for each item received									30	37	19	19	5	50	13	81
327. Determine price to be marked on tickets									71	89	68	69	6	60	15	94
OPERATE CHECKSTAND AND SALES REGISTER																
328. Figure and record sales									78	97	74	75	7	70	16	100
329. Receive and approve checks or credit									88	110	87	88	7	70	16	100
330. Accept and process merchandise returned by customer									89	111	88	89	7	70	16	100
331. Keep required inventory records									77	96	78	79	5	50	13	81
332. Prepare information reports on the checkstand									42	52	40	40	3	30	9	56

DISCUSSION

The Employee Profile

The profile of general merchandise retail employees drawn from the personal data section of the questionnaire highlights several important and interrelated facts concerned with education background, sex, and job mobility of the respondents. (See APPENDIX I)

Sex

Only 18 per cent of the non-supervisory category were male, but 58 per cent of all supervisors were male. These percentages indicate that, at present, relatively few females move into supervisory positions.

Education

Movement into the supervisory category of employment generally is facilitated by formal education beyond high school. Fifty-nine per cent of all supervisors have more than twelve years of education. Thirty-eight per cent of the supervisors have sixteen or more years of education.

Since the ultimate purpose of the study is to provide bases for planning distributive education curriculum, it is important to note that 16.8 per cent of the supervisory category had completed the thirteenth and fourteenth year. This implies that post-secondary schools have opportunity to play major roles in preparation of youth and adults for supervisory positions.

Job Mobility

The data indicate that, at present, relatively few non-supervisory personnel move from one type of work to another within firms and that relatively few move from one firm to another. Seventy-four per cent of the non-supervisory personnel had never transferred from one job to another within a firm and 85 per cent had transferred only one time or not at all.

Mobility of supervisors from one type of work to another within the firm generally appears to be associated with in-firm training programs. Eleven per cent of the supervisors had not transferred within the firm, 30 per cent had transferred once, 19 per cent twice and 19 per cent three times. Sixty-nine per cent of the supervisors had participated in one or more on-the-job management training programs.

Major Tasks Performed

Substantial percentages of non-supervisory employees indicated selling, stockkeeping, cashiering, receiving, display, and record keeping were major tasks within their job. Substantial percentages of supervisors indicated that they performed all of the above tasks plus advertising, pricing, buying, and controlling. Consequently, identification of knowledge clusters associated with performance of those combinations of tasks is an important element of curricula design.

The Task Analysis

Table V, Appendix J, shows the per cent of respondents performing each specific task. Activities performed by less than 20 per cent of the sample will not be considered in further identification of types and levels of knowledge essential for task performance. We feel that future curriculum development within this project should be limited to the types of activities performed by substantial percentages of retail employees.

Substantial percentages of both categories of employees do selling, keeping and counting stock and operating the checkstand and sales register. These tasks are common to the great majority of retail employees. Smaller percentages of all employees receive, check and mark merchandise, handle some in-store activities associated with delivery, and perform some activities associated with interior and window display. All the other major tasks studied are primarily performed by supervisory personnel in the merchandising division of the general merchandise retail store. The tasks of buying, pricing, and controlling merchandise are unique to the supervisors in all strata of stores.

The relatively small numbers within the sample who responded to the activities in display and advertising might indicate these activities are performed by specialists. The persistently low percentage of "yes" responses by non-supervisory personnel to the advertising activities indicates performance of this task is not a consistent part of their job requirement. Where supervisors indicate substantial percentage of performance of the activities (item numbers 184, 188, 189, 192, 196, 199 and 204) the primary function is coordinating the advertising with the in-store selling program. Those activities associated with preparing and placing advertisements are not performed by substantial percentages of either supervisory or non-supervisory personnel. It is concluded that the technical aspects of preparing and placing advertisements are performed by specialists within the firm or in a commercial agency.

Only three of the associated activities in the major task, computing information using mathematics skills, were performed by over 20 per cent of the non-supervisory personnel. They are number 146, figure fractions and decimals (29 per cent), number 148, work with percentages (28 per cent), and number 153, figure discounts and dating (33 per cent). All others associated activities in this major task were performed by less than 14 per cent of the non-supervisory respondents. These three associated activities combine in the hierarchy of mathematics skills to indicate using fractions, decimals and percentages to figure discounts is an essential part of non-supervisory task performance. These types of mathematics skills were also identified as essential to work in the other vocational fields studied by this project.

Major percentages of supervisors performed all activities in the tasks of computing information using mathematics skills. Skill in performance of this major task is, therefore, an essential criteria for retailing jobs at a supervisory level. On the contrary, limited use of mathematics skills is made at the non-supervisory level.

Only four of the associated activities in the major task of keeping accounts and records were performed by over 20 per cent of non-supervisory personnel. They were number 131, read and apply tax charts (45 per cent), number 135, record stock count information in proper book (28 per cent), number 137, record inventory records in proper forms (20 per cent), and number 145, use communications equipment: telephone, teletype, dictation equipment, etc. (47 per cent). Major percentages of supervisors performed the record keeping functions in the merchandising division. In the smaller general merchandise stores substantially larger percentages of non-supervisory personnel performed the record keeping function than in the department stores or variety stores.

Substantial percentages of both supervisory and non-supervisory personnel perform the in-store activities associated with preparing merchandise for delivery. However, a significantly larger percentage of supervisors perform these activities than do non-supervisors. Such low numbers of personnel reported performance of this task in limited price variety stores, that preparing merchandise for delivery cannot be considered a major task in the variety store.

Non-supervisory questionnaires contained control questions in the major tasks, usually performed by supervisors, of buying, pricing and controlling merchandise. Only minor percentages of non-supervisory employees indicated performance in these areas. A significantly larger percentage than expected of employees in the small general merchandise store performed these tasks, but in general, these tasks are not a part of the non-supervisory retail job.

Selected activities, usually considered non-supervisory, within the major tasks of selling, keeping and counting stock, receiving and marking merchandise and operating the checkstand and sales register were used as criterion items in the supervisory questionnaire. They were to test whether there is a difference between tasks performed by the two groups. Major percentages of both supervisory and non-supervisory personnel indicated performance of all those tasks. Within the major task of keeping and counting stock significantly larger percentages of supervisors recorded sales on unit control records, prepared merchandise for the sales floor, handled computer punch stock control tickets and counted and recorded stock, than did non-supervisory personnel. Larger percentages of supervisors than non-supervisors keep inventory records and prepare information reports on the checkstand operation than do non-supervisors.

There is a greater degree of specialization in task performance in most task areas in the department and variety stores than in the general merchandise stores. This specialization is most evident in such tasks as receiving and marking merchandise, operating the checkstand, keeping accounts and records, computing information using mathematics skills, display, and advertising. A significantly larger percentage of non-supervisory personnel performed these tasks in the general merchandise store than in the other two types.

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Analysis of this data suggests discrepancy between the types of work actually done and the content of some distributive education curricula. For those students being prepared primarily for entry jobs, great emphasis on the major tasks of selling, stockkeeping, checkstand operation and the routine procedures of receiving and marking merchandise is indicated. However, to prepare students with a background most likely to assure career long advancements, some advanced education preparing them to adapt to a broad range of tasks is essential.

The data indicate there is slight chance for movement into supervisory careers in merchandising without some post secondary school preparation.

The data indicates the technical aspects of planning, preparing and placing advertisements and most display activities are performed by a limited number of in-store or commercial specialists. Curriculum planning for supervisory level personnel in the sales promotion area apparently should be concerned with the functions of coordinating display and advertising activities with the in-store sales program. Since less than 20 per cent of the non-supervisory personnel reported performance of activities associated with planning, preparing and placing advertising, curricula designed for non-college bound students should orient to broad understandings of the purposes of and relationship of advertising and display to the total sales program.

In high school programs aimed at preparing non-college bound youth for entry positions in the merchandising divisions, the primary curriculum responsibility appears to be preparation of youth with the competencies to perform the selling, stockkeeping and cashiering functions. Many parts of the full range of distribution competencies, i.e. merchandising, basic skills, human relations, economics and technical content competencies, are inherent in these tasks. Data indicates that significant percentages of all merchandising employees perform these tasks. Thus, it is deemed essential to structure the distributive education curriculum to give emphasis to the types and levels of knowledge needed for proficiency in these major tasks.

Recommendations

For the second phase of our project we will:

1. Conduct a study of the types and levels of knowledge essential for performance of tasks done by substantial percentages of supervisory and non-supervisory personnel.

2. Continue analysis to identify clusters of tasks common to the wide range of occupations studied within this total project, (ERD 257-65).

3. Design distributive education curriculum at the secondary and post-secondary level based upon the

findings of the study. (A prototype of a unit of instruction on keeping and counting stock using a "systems approach" is being developed at the University of Idaho using data abstracted from this study.)

4. Make further analysis of the differences of task performance by personnel in the three SIC classifications studied.

We recommend that:

1. Similar studies be conducted in other types of retailing, wholesaling and service occupations and by other categories of employment within firms.

2. Similar studies be conducted in selected geographical locations to determine if there are regional differences in the tasks performed by non-supervisory and supervisory personnel.

3. Comparison be made between the findings of this study and existing curriculum at the high school and post high school levels.

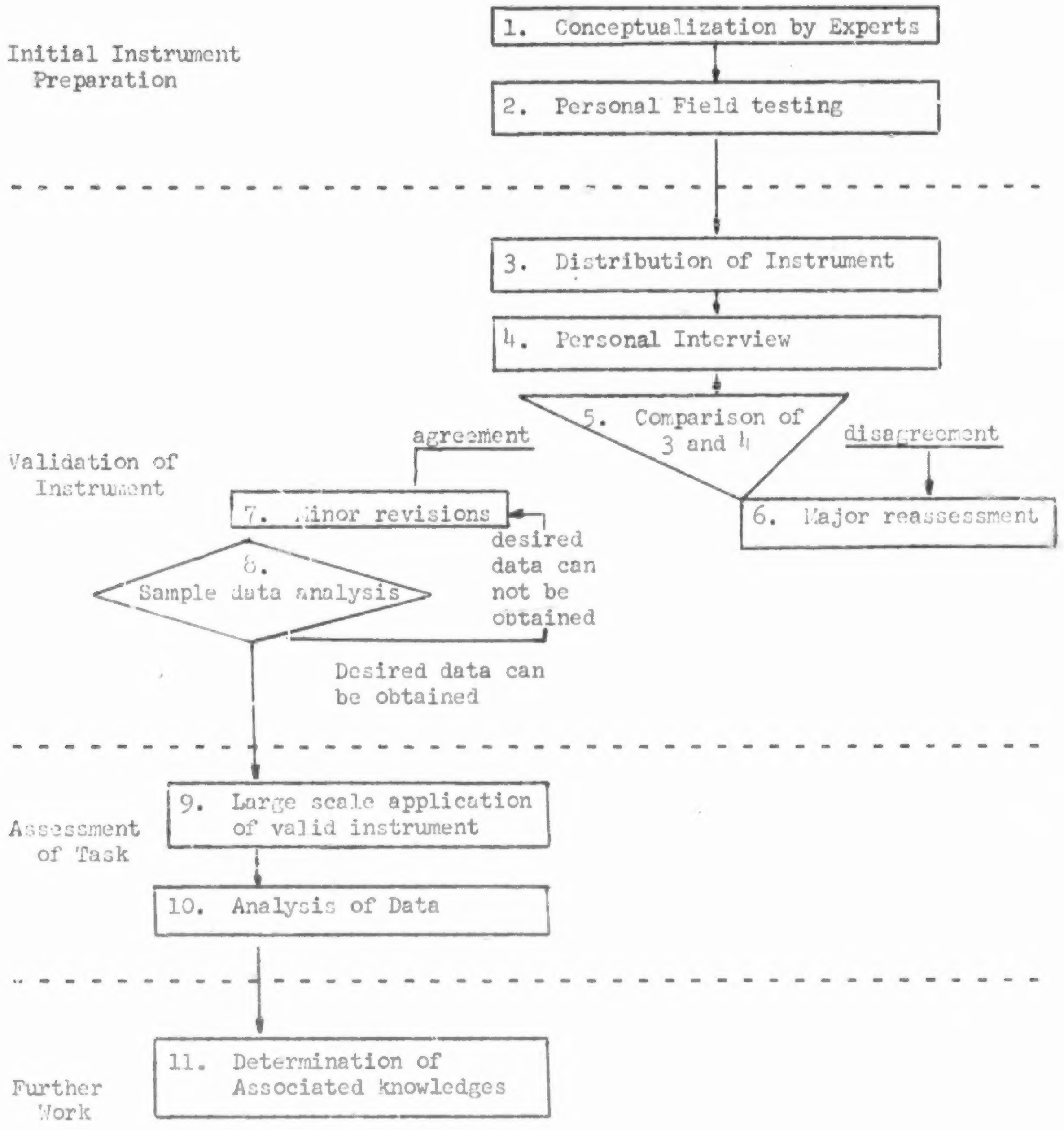
SUMMARY

The purpose of this study was to identify major tasks performed by merchandising employees working in three Standard Industrial Classifications of retail establishments. Those classifications are department stores, variety stores and general merchandise stores. By questionnaire, facts were obtained regarding 12 categories of work performed by supervisory and non-supervisory personnel. Those categories are selling, stockkeeping, checkstand operation, receiving and marking merchandise, delivery, keeping records, computing, display, advertising, buying, pricing, and merchandise control. From collections of that data percentages of employees performing each category of work were determined. This information will be utilized as bases for identification of clusters of knowledges associated with performance of work done by substantial percentages of employees. We assume that, along with requisite skills, acquisition of such knowledges will help pupils succeed in entry jobs and serve as bases for retraining, occupation mobility and career-long advancement.

APPENDIX

APPENDIX A

FLOW CHART FOR RETAIL TASK ASSESSMENT


Initial Instrument Preparation
1. Conceptualization by Experts
2. Personal Field testing
3. Distribution of Instrument
4. Personal Interview
5. Comparison of 3 and 4
agreement
disagreement
Validation of Instrument
7. Minor revisions
6. Major reassessment
8. Sample data analysis
desired data can not be obtained
Desired data can be obtained
Assessment of Task
9. Large scale application of valid instrument
10. Analysis of Data
Further Work
11. Determination of Associated knowledges

APPENDIX B

PERCENTAGES OF STORES AND EMPLOYEES IN KING-PIERCE COUNTIES, WASHINGTON, COMPARED TO NATIONAL PERCENTAGES FOR SIC 531, 533, 539

SIC	Number of Stores	Percentage of Stores		Number of Employees (Aug, 1966)	Percentage of Employees	
		King Pierce	National		King Pierce	National
531	37	.16	.07	11,516	.84	.70
533	81	.35	.36	1,164	.09	.20
539	116	.49	.57	963	.07	.10
TOTAL	234			13,643		

UNIVERSITY OF IDAHO

MOSCOW, IDAHO

College of Business Administration

DEPARTMENT OF OFFICE ADMINISTRATION
BUSINESS EDUCATION

APPENDIX C

May 31, 1966

Manager
Seattle-Tacoma Retail Firms

Dear Sir:

May we introduce Mr. Jack Hruska. He is acting as a professional interviewer representing the University of Idaho. We seek your cooperation in allowing Mr. Hruska to administer a questionnaire to part of your staff concerning the kind of work performed in the store which is essential for successful performance.

This interview is part of a vocational-technical education research project being conducted by the University of Idaho, Washington State University, and the U.S. Office of Education. It was developed in close cooperation with representatives of the National Retail Merchants Association and the National Variety Stores Merchants Association. It is part of a long range program designed to improve vocational education for non-college bound youth.

Please make some of your valuable employee time available to Mr. Hruska. Each questionnaire will take about fifteen to twenty minutes, yet we feel the time will have value to your firm in terms of future qualified workers.

Respectfully yours,

Kenneth Ertel, Director
Vocational-Technical Education
Research Project

KE/gs

APPENDIX D

BACKGROUND INFORMATION FOR INTERVIEWERS

THE PROJECT: The W.S.U. - Idaho vocational research project will identify the major tasks performed and the knowledges necessary for successful employment in many occupations. The common concepts identified will be used to develop units of instruction designed to prepare non-college bound youth for entry into and success in the world of work.

The retailing study is to identify the types and frequency of tasks merchandising oriented employees in the general merchandise retail field perform. Merchandising oriented employees are those whose job is directly involved with the goods, with the customer or with customer service. We exclude office, janitorial or other operation type persons since their tasks will be analyzed in another study.

THE SAMPLE: Employees and supervisors in a randomly selected sample of firms in King and Pierce counties in SIC 531 Department Store, SIC 533 Variety Store, and SIC 539 General Merchandise Store will constitute the sample.

THE INSTRUMENT: Two questionnaires have been constructed and field tested on which employees and supervisors respond about tasks they have performed in the past year.

Employees (white form) are all persons, full time or part time, who work with the merchandise or with customers directly. Supervisors (blue form) are those merchandising section employees who supervise more than two full-time employees and/or who are department heads, assistant buyers or buyers.

NEXT STAGE STUDY: (to begin December, 1966) Having identified the types and frequencies of tasks performed in modern retail operations, a small group of leading-edge retail employees will identify the knowledges essential to perform these tasks. These knowledges will be used as a basis for developing up-to-date units of instruction in distribution.

SUPPORT FOR THE STUDY: This project is funded under section 4 (c) Vocational Education Act of 1963 and is administered and conducted cooperatively by Washington State University and University of Idaho.

Advice and cooperation in its development has been received from the National Retail Merchants Association, The National Chain Store Executives Association, and the Variety Stores Executives Association. The advisory committee has representatives of each of these groups.

APPENDIX E

INSTRUCTIONS TO PERSONS DISTRIBUTING QUESTIONNAIRE

1. Go directly to the manager. He has already been told of the project by letter.

2. Get the total number of employees who are involved in merchandising. In addition, find out the total number of employees in the store. Also, obtain the total number of supervisors or operational management personnel.

3. Take a stratified random sample of 33 per cent of all employees in the department stores and 50 per cent of all employees in all other classifications of stores. A pre-selected random number is assigned on your list. Use this number to select every second or third person on the employee list.

4. Leave one white form for each employee and one blue form for each supervisor selected. Have management distribute them directly. Record the numbers of the questionnaires left, i.e., Rhodes Department Store: employee, 025-037; supervisor, 1114-1118.

5. Pilot studies have shown best returns are obtained when the instrument is distributed by management in a store meeting. Endeavor to get management to do this.

6. The next best method is for the manager to distribute them to all employees while you are still there. If they stack them on a desk, the forms will probably not be distributed. Above all, the forms must be given out directly to the employees by management.

7. If you feel the questionnaires will not get distributed, take them along and go to the next firm on the randomly selected list.

8. Use the employers list with the selected employees names to check off returned forms.

9. Return all unused forms.

10. If they will not cooperate, use the substitute firms on your list.

Example of procedure to use in recording disbursement of forms:

STORE NAME	TOTAL NUMBER EMPLOYEES IN ALL CATEGORIES	NUMBER ENGAGED IN MERCHANDISING	FORMS LEFT IN STORE			
			WHITE		BLUE	
			QUAN	NO	QUAN	NO
W. T. Grant Co.	43	26	20	20-40	6	110-115

APPENDIX F

NON-SUPERVISORY EMPLOYEES TASK SURVEY INSTRUMENT

You can help our schools give your sons and daughters the kind of education they need to earn a satisfactory income.

As you know, many changes are taking place in the kinds of work people do. Schools need up-to-date facts about exactly what kinds of work are being done. These facts will help schools provide useful training.

You have been selected to help with a nationwide study to show what actual kinds of work people in various occupations do.

The information will be strictly confidential.

Your cooperation is appreciated and will help your schools prepare young people for the future.

After you have completed the attached questionnaire, return it promptly in the enclosed self-addressed envelope. No postage is necessary.

THIS PROJECT IS SPONSORED BY:

United States Office of Education
Washington State University
University of Idaho
Washington State Board for Vocational Education
Idaho State Board for Vocational Education

THE FOLLOWING GENERAL INFORMATION WOULD BE VERY USEFUL IN THIS STUDY.

In questions 1 - 4 please fill in the blank with the necessary information.

1. Name ____

2. Present Job Title ____________________________

3. Name of Employing Firm ________________________

4. Address of Employing Firm ______________________

5. In which area do you work?
    - ____1. Building Trades
    - ____2. Electronics
    - ____3. Child Care
    - ____4. Food Service
    - ____5. Retail Sales
    - ____6. Office
    - ____7. Agriculture

6. Where did you receive your specialized occupational training?
    - ____1. On the job (not apprentice)
    - ____2. Apprentice
    - ____3. Military
    - ____4. Business College
    - ____5. Trade or Technical School
    - ____6. Correspondence
    - ____7. Specialized School (for example: IBM Key Punch School, Heavy Equipment School)
    - ____8. High School
    - ____9. Junior College
    - ____10. Self Taught
    - ____11. Other (please list)

      ____

      ____

      ____

      ____

      ____

In questions 7 - 11 please circle the one answer which applies.

7. What was the highest grade of school you completed?
8 or less, 9, 10, 11, 12, 13, 14, 15, 16 or more

8. Sex. Male Female

9. Age. Under 20 20-30 31-50 Over 50

10. For how many years have you been in your present occupation?

    Less than 1 year 1-5 years More than 5 yrs.

11. How many times have you changed occupations in the past 5 years?
(For example: plumber to sheet metal worker to retail sales = 2 changes.)

0 times   1 - 2 times   3 or more times

In questions 12 - 17 please check (✓) the one answer which applies:

12. Main emphasis of high school study:

____1. College Prep
____2. Vocational
____3. Business Education
____4. Distributive Education
____5. Scientific
____6. None

13. Highest level of on-the-job employment training program completed:

____1. Store Procedures
____2. Sales Training
____3. Supervisory Training
____4. Management Training
____5. None

14. Number of times you have been transferred from one major task to another within this firm, i.e., stockkeeping to selling to buyer, etc.

____1. None
____2. 1
____3. 2
____4. 3
____5. 4
____6. 5 to 7
____7. 8 to 10
____8. 11 to 20

15. Number of hours worked per week:

____1. Less than 20
____2. 20 - 32
____3. More than 32

16. How many employees do you supervise?

____1. None
____2. 1 - 5
____3. More than 5

17. What is your direct supervisor's job title?______________________________

18. Check each of the following statements which apply to your major task in the store.

____1. Selling
____2. Stockkeeping
____3. Cashiering
____4. Receiving, marking merchandise
____5. Display
____6. Advertising
____7. Delivery
____8. Record Keeping
____9. Pricing
____10. Buying
____11. Controlling Merchandise
____12. Credit Control
____13. Other
____14. Other

INSTRUCTIONS

On the following pages is a list of tasks (activities).

Read each task listed.

If you have actually performed the task during the past two years, check (✓) the blank under "YES" which appears to the left of the item.

If you have not performed the task in the last two years, check (✓) the blank under "NO" to the left of the item.

DO NOT CHECK "YES" UNLESS YOU HAVE ACTUALLY PERFORMED THIS TASK IN THE LAST TWO (2) YEARS.

MAKE CERTAIN THAT YOU CHECK EACH ITEM EITHER "YES" OR "NO".

An example may be helpful to you:

YES	NO	
✓	___	Type letters (A check of "YES" indicates you have typed letters as part of your occupation in the past couple of years.)
___	✓	Drive a truck (A check of "NO" indicates you have not driven a truck as part of your occupation in the past couple of years, even though you may be able to do it.)

IF YOU HAVE PERFORMED THESE TASKS
IN YOUR OCCUPATION IN THE PAST COUPLE
OF YEARS, CHECK (✓) YES; OTHERWISE, NO.

SELLING

	YES	NO	
1.	___	___	Greet the customer and determine wants and needs.
2.	___	___	Package merchandise.
3.	___	___	Direct customers to other departments and work interdepartmental sales.
4.	___	___	Help customer handle or try on merchandise.
5.	___	___	Determine amounts of credit charges or layaway charges.
6.	___	___	Receive stock from supplies or delivery man.
7.	___	___	Hear and handle complaints or refer to supervisor.
8.	___	___	Suggest additional or related items for sale.
9.	___	___	Fill out mail orders and catalog orders.
10.	___	___	Use company advertising in selling.
11.	___	___	Take phone orders and sell by telephone.
12.	___	___	Make written forms and reports to supervisors.
13.	___	___	Train new sales people.
14.	___	___	Prepare daily report forms.
15.	___	___	Explain care of merchandise and demonstrate its uses.
16.	___	___	Prepare merchandise for layaway.
17.	___	___	Translate product knowledge into customer benefits.
18.	___	___	Write merchandise return tickets.
19.	___	___	Return merchandise to its proper place in stock.
20.	___	___	Replenish floor stock from reserve stock.
21.	___	___	Write up orders for routine reorders of merchandise from basic stock list.
22.	___	___	Supervise sales personnel.
23.	___	___	Arrange stock in selling area and keep record of amounts and variety on hand.

YES NO

24. ___ ___ Study literature relating to a product.
25. ___ ___ Approve and accept checks.
26. ___ ___ Evaluate customers' wants and needs.
27. ___ ___ Serve more than one customer at a time during rush periods.
28. ___ ___ Follow up of sales to insure customer satisfaction and sell additional items.
29. ___ ___ Cover counters and garments at night.
30. ___ ___ Demonstrate merchandise.
31. ___ ___ Point out hidden values of merchandise.
32. ___ ___ Keep customer records in order to build up a clientele or following.
33. ___ ___ Use trade-ups with customers.
34. ___ ___ Gift wrap packages.
35. ___ ___ Use sales register and handle monies.
36. ___ ___ Process merchandise returns and exchanges.
37. ___ ___ Reticket merchandise.
38. ___ ___ Schedule hours and duties of other salespeople.
39. ___ ___ Assist customers in decision making.
40. ___ ___ Write sales tickets.
41. ___ ___ Confer with supervisor on selling problems.
42. ___ ___ Use a variety of techniques to close sales.
43. ___ ___ Count and record till and deposit money with cashier.
44. ___ ___ Maintain stock control records.
45. ___ ___ Make competitive shopping trips to other stores.
46. ___ ___ Check stock for damaged or soiled merchandise.
47. ___ ___ Construct departmental merchandise display.
48. ___ ___ Relate company policies to all decisions.
49. ___ ___ Rotate stock to keep first-in merchandise in prime selling position.
50. ___ ___ Order and replenish departmental supplies.
51. ___ ___ Keep counters and fixtures clean and in order.

Please list any other major types of selling tasks you perform in your occupation.

____

____

KEEPING AND COUNTING STOCK

YES NO

52. ___ ___ Keep counters and display fixtures clean and attractive.
53. ___ ___ Arrange stock for counting.
54. ___ ___ Inform responsible person when stocks are low.
55. ___ ___ Arrange understock and reserve stock.
56. ___ ___ Re-mark merchandise for special sales events.
57. ___ ___ Prepare rejected merchandise for return to supplier.
58. ___ ___ Unpack and assemble merchandise.
59. ___ ___ Record price of item on proper type ticket.
60. ___ ___ Record sales on unit control records.
61. ___ ___ Arrange selling stock.
62. ___ ___ Prominently display volume sellers at key traffic points.
63. ___ ___ Multiply and extend figures.
64. ___ ___ Correspond with suppliers about adjustments on merchandise received.
65. ___ ___ Prepare stock reports for management.
66. ___ ___ Prepare merchandise for sales floor.
67. ___ ___ Maintain stock control cords.
68. ___ ___ Keep stock neatly arranged and in order.
69. ___ ___ Keep older merchandise moved to front of selling stock.
70. ___ ___ Add long columns of figures.
71. ___ ___ Handle computer punch tickets.
72. ___ ___ Collect information, obtain facts and ideas and present them in clear, logical order.
73. ___ ___ Schedule stock counts.
74. ___ ___ Count and record stock.
75. ___ ___ Fill salesmen's orders for stock for delivery.
76. ___ ___ Replenish selling stock from reserve stock.
77. ___ ___ Deliver packaged merchandise to store exit for customer pickup.
78. ___ ___ Order special merchandise from catalog.

Please list any other major types of keeping and counting stock tasks you perform in your occupation:

____
____
____
____

OPERATING CHECKSTAND AND SALES REGISTER

	YES	NO	
79.	___	___	Greet customers.
80.	___	___	Record charge sales.
81.	___	___	Package merchandise.
82.	___	___	Figure daily sales register tally.
83.	___	___	Prepare technical reports.
84.	___	___	Use communications equipment: telephone, teletype, dictation equipment, loud-speaker, etc.
85.	___	___	Receive checks from customers.
86.	___	___	Accept and process merchandise returned by customers.
87.	___	___	Record stock numbers of items sold on the sales register.
88.	___	___	Record cash sales.
89.	___	___	Record C.O.D. sales.
90.	___	___	Handle received on account and paid out transactions.
91.	___	___	Handle split tickets, punched tickets, and other unit control inventory devices.
92.	___	___	Make change.
93.	___	___	Use charge plates.
94.	___	___	Gift wrap merchandise.
95.	___	___	Check out register at end of day.
96.	___	___	Replace sales register tapes.
97.	___	___	Get credit department approval on non-routine credit purchases.

Please list any other major types of checkstand and sales register operation tasks you perform in your occupation.

____
____
____
____

RECEIVING, CHECKING, AND MARKING MERCHANDISE

YES NO

98. ___ ___ Receive merchandise from delivery men and common carriers.
99. ___ ___ Ticket merchandise.
100. ___ ___ Distribute merchandise to selling floor and to reserve stockroom.
101. ___ ___ Process packing lists.
102. ___ ___ Work with fractions, decimals, and percentages in determining prices to be marked on merchandise.
103. ___ ___ Count merchandise and compare it with invoice and buyer's order to insure agreement as to quality, color, size, and style.
104. ___ ___ Unpack merchandise.
105. ___ ___ Check condition of merchandise received.
106. ___ ___ Prepare merchandise for delivery to selling floor.
107. ___ ___ Correspond with suppliers concerning returns and adjustments.
108. ___ ___ Prepare right type of ticket with necessary information for each item received.
109. ___ ___ Prepare insurance forms on damaged merchandise received.
110. ___ ___ Report incorrect orders and damaged stock to supervisor.
111. ___ ___ Keep receiving room tools and equipment in order.
112. ___ ___ Mark tickets using store's coding systems for prices. stock numbers, and dating.
113. ___ ___ Keep receiving room clean and orderly.
114. ___ ___ Determine price to be marked on merchandise from buyer's or merchandise manager's information sheet.

Please list any other major types of receiving, checking, and marking tasks you perform in your occupation:

____

____

____

____

DELIVERY

YES NO

115. ___ ___ Prepare delivery sales tickets.
116. ___ ___ Figure delivery dates from schedules.
117. ___ ___ Install delivered goods in home.
118. ___ ___ Suggest additional related purchases when delivering goods.
119. ___ ___ Collect on C.O.D. delivery.
120. ___ ___ Figure postage rates.
121. ___ ___ Fill in standardized delivery forms.
122. ___ ___ Prepare and record C.O.D. sales.
123. ___ ___ Figure delivery cost from schedules.
124. ___ ___ Figure least expensive routing and carrier on deliveries.
125. ___ ___ Package merchandise and take to delivery department.

Please list any other major types of delivery tasks you perform in your occupation:

____
____
____
____

KEEPING ACCOUNTS AND RECORDS

YES NO

126. ___ ___ Keep customer credit records of charges and payments.
127. ___ ___ Prepare sales register stock control tapes for transmittal to computer center.
128. ___ ___ Compute payroll.
129. ___ ___ Prepare daily sales sheets by department or employee.
130. ___ ___ Keep records and copies of store advertisements.
131. ___ ___ Read and apply tax charts.
132. ___ ___ Record daily sales in unit control forms.
133. ___ ___ Collect information and prepare reports in clear, logical manner.
134. ___ ___ Record and report federal and state taxes.

YES NO

135. ___ ___ Record stock count information in proper book.
136. ___ ___ Figure withholding tax and other deductions.
137. ___ ___ Record inventory records in proper form.
138. ___ ___ Take and file customer credit applications and references.
139. ___ ___ Prepare key punched stock control tickets for transmittal to supplier.
140. ___ ___ Record receipts and payment in proper amounts.
141. ___ ___ Record invoice information in proper record forms.
142. ___ ___ Record time clock data on payroll forms.
143. ___ ___ Record sales register tapes.
144. ___ ___ Keep current files of invoices and purchase orders.
145. ___ ___ Use communications equipment: telephone, teletype, dictation equipment, etc.

Please list any other major types of account and record tasks you perform in your occupation:

____

____

____

COMPUTING INFORMATION USING MATHEMATICS SKILLS

YES NO

146. ___ ___ Figure fractions and decimals.
147. ___ ___ Use transportation costs and terms of sale in computing costs of merchandise.
148. ___ ___ Work with percentages.
149. ___ ___ Use accounting system based on retail price.
150. ___ ___ Figure gross margin percentages.
151. ___ ___ Use transportation rate schedule.
152. ___ ___ Analyze charts and graphs.
153. ___ ___ Figure discounts and datings.
154. ___ ___ Compute factors which affect gross margin.

YES NO

155. ___ ___ Calculate turnover rate.
156. ___ ___ Compute stock to sales ratios.
157. ___ ___ Figure cash and trade discounts.
158. ___ ___ Compute open to buy.
159. ___ ___ Use formulas for markup and markdown.

Please list any other major types of computing tasks you perform in your occupation.

____
____
____

PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS

YES NO

160. ___ ___ Clean the store windows.
161. ___ ___ Prepare or assemble items for display.
162. ___ ___ Set up departmental displays of sales items.
163. ___ ___ Select appropriate theme, color scheme, and type of fixture.
164. ___ ___ Train display personnel.
165. ___ ___ Schedule displays for department.
166. ___ ___ Gather merchandise for use in displays, keep records of the items, and return to stock.
167. ___ ___ Make selling displays.
168. ___ ___ Dismantle displays and return merchandise to stock.
169. ___ ___ Coordinate pieces and accessorize merchandise to be displayed.
170. ___ ___ Plan seasonal display themes.
171. ___ ___ Select time and place for each display.
172. ___ ___ Dress mannequins for display.
173. ___ ___ Make departmental signs.
174. ___ ___ Put up interior store decorations.
175. ___ ___ Coordinate displays of advertised and featured merchandise.
176. ___ ___ Purchase supplies for displays.
177. ___ ___ Develop a display budget.
178. ___ ___ Design layout of each display.

YES NO

179. ___ ___ Make background pieces.
180. ___ ___ Trim show windows and set up displays.
181. ___ ___ Dress showcase.
182. ___ ___ Cover displays at night.
183. ___ ___ Use and service display equipment (mannequins, sign holders, sign printers, staplers, saws, paint equipment, etc.)

Please list any other major types of display tasks you perform in your occupation:

____

____

____

PLANNING, PREPARING, AND PLACING ADVERTISEMENTS

YES NO

184. ___ ___ Determine customer demand for store's products.
185. ___ ___ Secure or prepare illustrations.
186. ___ ___ Write headlines.
187. ___ ___ Write radio copy.
188. ___ ___ Coordinate displays and advertisements.
189. ___ ___ Evaluate effectiveness of ads in terms of sales.
190. ___ ___ Plan institutional form for ads designed to establish a store image.
191. ___ ___ Write newspaper copy.
192. ___ ___ Use other store display and selling areas in conjunction with advertising.
193. ___ ___ Supervise work of other employees.
194. ___ ___ Prepare advertising budget.
195. ___ ___ Price advertising in various media.
196. ___ ___ Proofread ads.
197. ___ ___ Use telephone to advertise.
198. ___ ___ Train other advertising personnel.
199. ___ ___ Plan advertising program and schedule.
200. ___ ___ Make basic layout plans.
201. ___ ___ Use commercial mat services.

YES NO

202. ___ ___ Use various type styles on copy.
203. ___ ___ Take advertising copy to media for preparation of proof copies.
204. ___ ___ Keep copies of all ads.

Please list any other major types of advertising tasks you perform in your occupation:

____

____

____

You may occasionally be called on to perform tasks normally done by operational management personnel. Will you indicate below the management tasks you perform regularly in connection with your job.

BUYING MERCHANDISE FOR RESALE

YES NO

205. ___ ___ Determine customer demand.
206. ___ ___ Analyze selling or operating cost for department, salesperson, line of merchandise, etc.
207. ___ ___ Establish price lines for department and prices for individual items.
208. ___ ___ Make decisions on hiring, promoting, or firing employees.
209. ___ ___ Negotiate with vendors on terms and discount procedures.
210. ___ ___ Compute open to buy amount by department and smaller units.
211. ___ ___ Go to vendors' shows or to market to make buying decisions.
212. ___ ___ Shop competitive stores.

Please list any other major types of buying tasks you perform in your occupation:

____

____

____

PRICING MERCHANDISE

YES NO

213. ___ ___ Determine what factors affect your gross margin.
214. ___ ___ Determine rate of turnover for item, line, or department and apply results to store situation.
215. ___ ___ Evaluate and determine rate or amount of trade-ins and premiums or various items.
216. ___ ___ Apply factors of how the price affects the consumer to the pricing of items.
217. ___ ___ Use the store's pricing policies in determining price of a product.
218. ___ ___ Determine markup and markdown.

Please list any other major types of pricing tasks you perform in your occupation:

____

____

____

CONTROLLING MERCHANDISE

YES NO

219. ___ ___ Forecast sales for a season/year.
220. ___ ___ Schedule and conduct inventories.
221. ___ ___ Match inventory to customer demand.
222. ___ ___ Determine departmental operating costs or selling costs.
223. ___ ___ Compute and use turnover figures.
224. ___ ___ Estimate expenses and price reductions for a season/year.
225. ___ ___ Use various inventory control systems.

Please list any other major types of merchandise control tasks you perform in your occupation:

____

____

____

APPENDIX G

SUPERVISORS TASK SURVEY INSTRUMENT

You can help our schools give your sons and daughters the kind of education they need to earn a satisfactory income.

As you know, many changes are taking place in the kinds of work people do. Schools need up-tp-date facts about exactly what kinds of work are being done. These facts will help schools provide useful training.

You have been selected to help with a nation-wide study to show what actual kinds of work people in various occupations do.

The information will be strictly confidential.

Your cooperation is appreciated and will help your schools prepare young people for the future.

After you have completed the attached questionnaire, return it promptly in the enclosed self-addressed envelope. No postage is necessary.

THIS PROJECT IS SPONSORED BY:

United States Office of
Education
Washington State University
University of Idaho
Washington State Board for
Vocational Education
Idaho State Board for
Vocational Education

THE FOLLOWING GENERAL INFORMATION
WOULD BE VERY USEFUL IN THIS STUDY

In questions 1 - 4 please fill in the blank with the necessary information.

1. Name ____________________________________

2. Present Job Title ___________________________

3. Name of Employing Firm ______________________

4. Address of Employing Firm ____________________

In questions 5 - 6 check (✓) all the answers that apply to you.

5. In which area do you work?

____1. Building Trades
____2. Electronics
____3. Child Care
____4. Food Service
____5. Retail Sales
____6. Office
____7. Agriculture

6. Where did you receive your specialized occupational training?

____1. On the job (not apprentice)
____2. Apprentice
____3. Military
____4. Business College
____5. Trade or Technical School
____6. Correspondence
____7. Specialized School (for example: IBM Key Punch School, Heavy Equipment School)
____8. High School
____9. Junior College
____10. Self Taught
____11. Other (please list)
____
____
____
____
____
____

In questions 7 - 11 please circle the one answer which applies.

7. What was the highest grade of school you completed?

8 or less, 9, 10, 11, 12, 13, 14, 15, 16 or more

8. Sex. Male Female

9. Age. Under 20 20-30 31-50 Over 50

10. For how many years have you been in your present occupation?

Less than 1 year 1-5 years More than 5 years

11. How many times have you changed occupations in the past 5 years? (For example: plumber to sheet metal worker to retail sales = 2 changes)

0 times 1 - 2 times 3 or more times

In questions 12 - 17 please check (✓) the one answer which applies.

12. Main emphasis of high school study.

____1. College Prep
____2. Vocational
____3. Business Education
____4. Distributive Education
____5. Scientific
____6. None

13. Highest level of on-the-job employment training program completed.

____1. Store Procedures
____2. Sales Training
____3. Supervisory Training
____4. Management Training
____5. None

14. Number of times you have transferred from one major task to another within this firm, i.e., stockkeeping to selling to buyer, etc.

____1. None
____2. 1
____3. 2
____4. 3
____5. 4
____6. 5 to 7
____7. 8 to 10
____8. 11 to 20

15. Number of hours worked per week.

____1. Less than 20
____2. 20 - 32
____3. More than 32

16. Now many employees do you supervise?

____1. None
____2. 1 - 5
____3. More than 5

17. What is your direct supervisor's job title?________________________________

18. Check each of the following statements which apply to your major task in the store.

____1. Selling
____2. Stockkeeping
____3. Cashiering
____4. Receiving, marking merchandise
____5. Display
____6. Advertising
____7. Delivery
____8. Record keeping
____9. Pricing
____10. Buying
____11. Controlling merchandise
____12. Credit control
____13. Other________
____14. Other________

INSTRUCTIONS

On the following pages is a list of tasks (activities).

Read each task listed.

If you have actually performed the task during the past two years, check (✓) the blank under "YES" which appears to the left of the item.

If you have not performed the task in the last two years, check (✓) the blank under "NO" to the left of the item.

DO NOT CHECK "YES" UNLESS YOU HAVE ACTUALLY PERFORMED THIS TASK IN THE LAST TWO (2) YEARS.

MAKE CERTAIN THAT YOU CHECK EACH ITEM EITHER "YES" OR "NO".

An example may be helpful to you:

YES	NO	
✓	___	Type letters (A check of "YES" indicates you have typed letters as part of your occupation in the past couple of years.)
___	✓	Drive a truck (A check of "NO" indicates you have not driven a truck as part of your occupation in the past couple of years, even though you may be able to do it)

IF YOU HAVE PERFORMED THESE TASKS
IN YOUR OCCUPATION IN THE PAST COUPLE
OF YEARS, CHECK (✓) YES; OTHERWISE NO.

DELIVERY

YES NO

115. ___ ___ Prepare delivery sales tickets.
116. ___ ___ Figure delivery dates from schedules.
117. ___ ___ Install delivered goods in home.
118. ___ ___ Suggest additional related purchases when delivering goods.
119. ___ ___ Collect on C.O.D. delivery.
120. ___ ___ Figure postal rates.
121. ___ ___ Fill in standardized delivery form.
122. ___ ___ Prepare and record C.O.D. sales.
123. ___ ___ Figure delivery cost from schedules.
124. ___ ___ Figure least expensive routing and carrier on deliveries.
125. ___ ___ Package merchandise and take to delivery department.

Please list any other major types of delivery tasks you perform in your occupation:

____

____

____

KEEPING ACCOUNTS AND RECORDS

YES NO

126. ___ ___ Keep customer credit records of charges and payments.
127. ___ ___ Prepare sales register stock control tapes for transmittal to computer center.
128. ___ ___ Compute payroll.
129. ___ ___ Prepare daily sales sheets by department or employee.
130. ___ ___ Keep records and copies of store advertisements.
131. ___ ___ Read and apply tax charts.
132. ___ ___ Record daily sales in unit control forms.

YES NO

133. ___ ___ Collect information and prepare reports in clear, logical manner.
134. ___ ___ Record and report federal and state taxes.
135. ___ ___ Record stock count information in proper book.
136. ___ ___ Figure withholding tax and other deductions.
137. ___ ___ Record inventory records in proper form.
138. ___ ___ Take and file customer credit applications and references.
139. ___ ___ Prepare key punched stock control tickets for transmittal to supplier.
140. ___ ___ Record receipts and payment in proper accounts.
141. ___ ___ Record invoice information in proper record forms.
142. ___ ___ Record time clock data on payroll forms.
143. ___ ___ Record sales register tapes.
144. ___ ___ Keep current files of invoices and purchase orders.
145. ___ ___ Use communications equipment: telephone, teletype, dictation equipment, etc.

Please list any other major types of account and record tasks you perform in your occupation:

____

____

____

COMPUTING INFORMATION USING MATHEMATICS SKILLS

YES NO

146. ___ ___ Figure fractions and decimals.
147. ___ ___ Use transportation costs and terms of sale in computing costs of merchandise.
148. ___ ___ Work with percentages.
149. ___ ___ Use accounting system based on retail price.
150. ___ ___ Figure gross margin percentages.
151. ___ ___ Use transportation rate schedules.

YES NO

152. ___ ___ Analyze charts and graphs.
153. ___ ___ Figure discounts and datings.
154. ___ ___ Compute factors which affect gross margin.
155. ___ ___ Calculate turnover rate.
156. ___ ___ Compute stock to sales ratios.
157. ___ ___ Figure cash and trade discounts.
158. ___ ___ Compute open to buy.
159. ___ ___ Use formulas for markup and markdown.

Please list any other major types of computing tasks you perform in your occupation:

____
____
____

PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS

YES NO

160. ___ ___ Clean the store windows.
161. ___ ___ Prepare or assemble items for display.
162. ___ ___ Set up departmental displays of sales items.
163. ___ ___ Select appropriate theme, color scheme, and type of fixture.
164. ___ ___ Train display personnel.
165. ___ ___ Schedule displays for department.
166. ___ ___ Gather merchandise for use in displays, keep records of the items, and return to stock.
167. ___ ___ Make selling displays.
168. ___ ___ Dismantle displays and return merchandise to stock.
169. ___ ___ Coordinate pieces and accessorize merchandise to be displayed.
170. ___ ___ Plan seasonal display themes.
171. ___ ___ Select time and place for each display.
172. ___ ___ Dress mannequins for display.
173. ___ ___ Make departmental signs.
174. ___ ___ Put up interior store decorations.
175. ___ ___ Coordinate displays of advertised and featured merchandise.
176. ___ ___ Purchase supplies for displays.
177. ___ ___ Develop a display budget.

YES NO

178. ___ ___ Design layout of each display.
179. ___ ___ Make background pieces.
180. ___ ___ Trim show windows and set up displays.
181. ___ ___ Dress showcase.
182. ___ ___ Cover displays at night.
183. ___ ___ Use and service display equipment (mannequins, sign holders, sign painters, staplers, saws, paint equipment, etc.)

Please list any other major types of display tasks you perform in your occupation:

____
____
____

PLANNING, PREPARING, AND PLACING ADVERTISEMENTS

YES NO

184. ___ ___ Determine consumer demand for store's products.
185. ___ ___ Secure or prepare illustrations.
186. ___ ___ Write headlines.
187. ___ ___ Write radio copy.
188. ___ ___ Coordinate displays and advertisements.
189. ___ ___ Evaluate effectiveness of ads in terms of sales.
190. ___ ___ Plan institutional form for ads designed to establish a store image.
191. ___ ___ Write newspaper copy.
192. ___ ___ Use other store display and selling areas in conjunction with advertising.
193. ___ ___ Supervise work of other employees.
194. ___ ___ Prepare advertising budget.
195. ___ ___ Price advertising in various media.
196. ___ ___ Proofread ads.
197. ___ ___ Use telephone to advertise.
198. ___ ___ Train other advertising personnel.
199. ___ ___ Plan advertising program and schedule.
200. ___ ___ Make basic layout plans.
201. ___ ___ Use commercial mat service.

YES NO

202. ___ ___ Use various type styles in copy.
203. ___ ___ Take advertising copy to media for preparation of proof copies.
204. ___ ___ Keep copies of all ads.

Please list any other major types of advertising tasks you perform in your occupation:

____
____
____

BUYING MERCHANDISE FOR RESALE

YES NO

226. ___ ___ Determine customer demand.
227. ___ ___ Analyze selling or operating cost for department, salesperson, line of merchandise, etc.
228. ___ ___ Communicate with supplier about returns or adjustments on purchases.
229. ___ ___ Select buying sources.
230. ___ ___ Establish price lines for department and prices for individual items.
231. ___ ___ Handle employee complaints.
232. ___ ___ Keep up on current trends in buying and styles.
233. ___ ___ Sell on floor.
234. ___ ___ Instruct salespeople in new merchandise information.
235. ___ ___ Supervise salespeople.
236. ___ ___ Train new salespeople and stock people.
237. ___ ___ Make routine purchase order decisions, i.e., route, type transport, delivery schedule, dating, amounts.
238. ___ ___ Determine markdowns.
239. ___ ___ Make decisions on hiring, promoting, or firing employees.
240. ___ ___ Select and/or buy merchandise for special promotions.
241. ___ ___ Negotiate with vendors on terms and discount procedures.

YES NO

242. ___ ___ Establish merchandise dating procedure.
243. ___ ___ Make routine reports on employee effectiveness to personnel manager.
244. ___ ___ Use manufacturers' semi-automated price ticket stock count and reorder process on basic stock.
245. ___ ___ Use middlemen in some purchases.
246. ___ ___ Set advertising schedule and budget.
247. ___ ___ Compute open to buy amounts by department and smaller units.
248. ___ ___ Keep and invoice inventory control.
249. ___ ___ Go to vendors' shows or to market to make buying decisions.
250. ___ ___ Schedule special promotions.
251. ___ ___ Prepare purchase orders with transportation rates and schedules.
252. ___ ___ Plan layout of merchandise.
253. ___ ___ Make decisions on customer returns and allowances.
254. ___ ___ Set up basic stock schedules for department and set reorder procedure on basic stock.
255. ___ ___ Establish code system for marking merchandise.
256. ___ ___ Order from catalogs.
257. ___ ___ Figure turnover rates by department and by individual items.
258. ___ ___ Supervise inventories.
259. ___ ___ Schedule buying and delivery dates.
260. ___ ___ Shop competitive stores.
261. ___ ___ Schedule employees' work week.
262. ___ ___ Figure stock to sales ratio.
263. ___ ___ Maintain and use a unit control system on special merchandise.
264. ___ ___ Communicate with vendors about adjustments or returns on incorrect orders.
265. ___ ___ Make decisions on quantities, styles, varieties, etc. to buy.
266. ___ ___ Communicate with insurance companies on claims and adjustments.

YES NO

267. ___ ___ Develop advertising plans.
268. ___ ___ Determine department, line, and item markup percentages.

Please list any other major types of buying resale merchandise tasks you perform in your occupation:

____
____
____

PRICING MERCHANDISE

YES NO

269. ___ ___ Use federal and state laws that apply to pricing goods when establishing initial prices.
270. ___ ___ Determine what factors affect your gross margin.
271. ___ ___ Use the law of supply and demand in determining initial markup.
272. ___ ___ Work with decimals, fractions and percentages in establishing prices.
273. ___ ___ Consider the costs involved in determining a price for an item.
274. ___ ___ Employ the use of elastic and inelastic demand in pricing decisions.
275. ___ ___ Determine the cost of merchandise sold.
276. ___ ___ Determine rate of turnover for item, line or department and apply results to store situation.
277. ___ ___ Use coding systems in premarking merchandise.
278. ___ ___ Evaluate and determine rate or amount of trade-ins and premiums on various items.
279. ___ ___ Analyze the use of trading stamps and their effect on the item's price.
280. ___ ___ Use loss leaders in your promotion and sales policies.
281. ___ ___ Apply factors of how the price affects the consumer to the pricing of items.
282. ___ ___ Use the store's pricing policies in determining price of a good.

YES NO

283. ___ ___ Determine markup and markdown.
284. ___ ___ Use the principles of monopoly pricing, competitive pricing, judgment pricing, and price lining.
285. ___ ___ Use manufacturers' pre-priced merchandise in determining prices.
286. ___ ___ Use markup and markdown formulas.
287. ___ ___ Figure open to buy.

Please list any other major types of pricing tasks you perform in your occupation:

____
____
____

CONTROLLING MERCHANDISE

YES NO

288. ___ ___ Forecast sales for a season/year.
289. ___ ___ Determine current sales trends.
290. ___ ___ Use computers in figuring and analyzing inventory.
291. ___ ___ Schedule and conduct inventories.
292. ___ ___ Match inventory to customer demand.
293. ___ ___ Use ratios in determining selling cost factors.
294. ___ ___ Employ a pattern for the placement of merchandise on shelves.
295. ___ ___ Determine open to buy.
296. ___ ___ Make sales forecasts (based on multiple control factors).
297. ___ ___ Maintain open to buy records.
298. ___ ___ Use purchase request forms.
299. ___ ___ Maintain adequate inventory of most-wanted stock items.
300. ___ ___ Use split ticket system for reporting sales.
301. ___ ___ Determine departmental operating costs or selling costs.

YES NO

302. ___ ___ Train stock keepers.
303. ___ ___ Make up basic stock and routine reorder schedules.
304. ___ ___ Compute and use turnover figures.
305. ___ ___ Use unit inventory control systems including periodic and perpetual count systems.
306. ___ ___ Estimate expenses and price reductions for a season/year.
307. ___ ___ Use dollar inventory control system.
308. ___ ___ Prepare computer punch tickets for transmittal to supplier or computer center.
309. ___ ___ Control losses through markdowns.
310. ___ ___ Employ a pattern for arranging selling stock, understock, reserve stock.
311. ___ ___ Use invoice inventory control system.
312. ___ ___ Prepare sales register inventory tapes for transmittal to computer center.

Please list any other major types of merchandise control tasks you perform in your occupation:

____
____
____

In order to reach your current position you had to engage in entry level type tasks. Will you indicate which of these tasks you still perform as a part of your operation[illegible]anagement duties.

SELLING

YES NO

313. ___ ___ Complete the personal selling process.
314. ___ ___ Interpret store policies to customers and salespeople.
315. ___ ___ Supervise and train sales personnel.

YES NO

316. ___ ___ Handle routine stockkeeping functions.
317. ___ ___ Operate and service the cash register.

Please list any other major types of selling tasks you perform in your occupation:

____
____
____

KEEPING AND COUNTING STOCK

YES NO

318. ___ ___ Arrange and keep stock.
319. ___ ___ Prepare stock for special sales events.
320. ___ ___ Record sales on unit control records.
321. ___ ___ Prepare merchandise for sales floor.
322. ___ ___ Handle computer punch stock control tickets.
323. ___ ___ Count and record stock.

Please list any other major types of stockkeeping tasks you perform in your occupation:

____
____
____

RECEIVING, CHECKING, AND MARKING MERCHANDISE

YES NO

324. ___ ___ Receive merchandise and prepare for pricing.
325. ___ ___ Check condition of merchandise received and handle required related correspondence.
326. ___ ___ Prepare price tickets with necessary information for each item received.
327. ___ ___ Determine price to be marked on tickets.

Please list any other major types of receiving, checking, and marking tasks you perform in your occupation:

____
____
____

OPERATE CHECKSTAND AND SALES REGISTER

YES NO

328. ___ ___ Figure and record sales.
329. ___ ___ Receive and approve checks or credit.
330. ___ ___ Accept and process merchandise returned by customer.
331. ___ ___ Keep required inventory records.
332. ___ ___ Prepare information reports on the checkstand.

Please list any other major types of checkstand and sales register tasks you perform in your occupation:

____
____
____

APPENDIX H

TABLE III

RETAILING TASK ANALYSIS

QUESTIONNAIRE RETURNS FROM RANDOM ORDER SELECTION OF STORES BY SIC CODE

	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966					
531--Department Stores							
Sears, Roebuck and Co. 1st S. and S. Lander King County	604	480	192	64	54	30	20
Bon Marche Northgate Mall King County	634	608	405	92	68	25	22
Frederick & Nelson Fifth and Pine King County	2569	2508	880	191	170	60	52
Rhode's Western Lakewood Villa Plaza Pierce County	142	136	75	30	30	5	4

TABLE III (Continued)

	Number of Employees All Categories						
	WSES July 1965	Actual June 1966	Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
531--Department Stores							
Rhodes Department Store Second and Union King County	286	253	100	30	25	5	2
J. C. Penney Co. Second and Pike King County	470	423	200	65	63	10	10
J. C. Penney Co. 5424 S. Tacoma Way Pierce County	253	250	210	75	15	8	2
Butler Brothers Department Store 300 Northgate Plaza King County	82	75	45	15	15	3	2
SUB TOTAL (SIC 531)	5040	4733	2107	562	440	146	114
Per Cent Returned					78%		78%

TABLE III (Continued)

	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966					
533--Limited Price Variety Stores							
F. W. Woolworth Co. Third and Pike King County	210	147	60	25	23	5	5
Sprouse Reitz Co. 1201 South K Pierce County	7	7	7	3	3	1	1
Meredith's 10¢ Store 3222 West McGraw King County	6	5	5	2	2	0	0
Spanaway Five and Ten 165th and Pacific Ave. Spanaway Pierce County	3	4	4	2	2	1	1
Wellworth 10¢ Store Box 323 North Bend King County	2	2	2	1	1	0	0

TABLE III (Continued)

	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966					
533--Limited Price Variety Stores							
Capitol Hill 10¢ Store 422 15th Ave., East King County	2	2	2	1	1	0	0
Rasco 5-10-25 Cent Stores 8536 Greenwood North King County	4	4	4	1	1	1	1
J. H. Pohlman Co. 101 Meridian Street Puyallup Pierce County	4	5	5	2	2	1	1
W. T. Grants Renton King County	42	25	25	11	11	2	2
SUB TOTAL (SIC 533)	280	201	114	48	46	11	11
Per Cent Returned					95%		100%

TABLE III (Continued)

	Number of Employees All Categories						
	WSES July 1965	Actual June 1966	Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
539--General Merchandise Stores							
The Grange Store Carnation, Washington King County	6	4	4	2	2	0	0
Glazier Dry Goods North Bend, Washington King County	4	3	3	2	2	0	0
Jensen and Company 1533 Cole Street Enumclaw King County	3	1	1	0	0	1	1
Grange Supply Co. Issaquah, Washington King County	9	7	7	4	4	0	0
Murray's Fine Fabrics 214 West Meeker Street Kent King County	4	3	3	1	1	1	1

TABLE III (Continued)

	Number of Employees All Categories						
	WSES July 1965	Actual June 1966	Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
539--General Merchandise Stores							
Discount Mart 115 Broadway Pierce County	5	4	4	3	3	1	1
House of Values 9000 Rainier South King County	70	72	64	27	25	5	5
Seattle Surplus Sales 2400 First Ave. King County	2	2	2	1	1	0	0
Jean's Fabrics 125 Commercial Ave. Kirkland King County	2	3	3	1	1	1	1
Tacoma Fashion Fabrics 916 Broadway Pierce County	5	4	4	3	3	1	1

TABLE III (Continued)

	Number of Employees All Categories						
	WSES July 1965	Actual June 1966	Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
539--General Merchandise Stores							
The Towne Shop North Bend King County	2	3	3	1	1	1	1
Mayo Sleep Products 9827 16th Ave. S.W. King County	1	2	2	1	1	0	0
Winter's Inc. 6169 4th Ave. South King County	11	15	15	6	6	2	2
Value Mart North Aurora King County	42	40	31	10	9	5	5
SUB TOTAL (SIC 539)	166	163	146	62	59	18	18
Per Cent Returned					95%		100%
TOTAL	5486	5097	2367	672	545	175	143
Per Cent Returned					81%		81%

APPENDIX I

RETAILING TASK ANALYSIS

GENERAL MERCHANDISE RETAIL WORKER PROFILE

Per Cents of Non-Supervisors Responding N = 484	Per Cents of Supervisors Responding N = 125	
		6. Where did you receive your specialized occupational training?
85.3	82.4	On the job (not apprentice)
3.9	4.0	Apprentice
2.1	2.4	Military
5.4	10.4	Business College
4.3	0.8	Trade School
2.3	0.0	Correspondence
1.7	1.7	Specialized school
18.4	18.4	High School
1.9	2.4	Junior College
15.5	16.0	Self taught
9.9	21.6	Other
		7. What was the highest grade of school you completed?
2.5	0.8	8 or less
3.1	1.6	9
5.2	0.0	10
7.0	3.2	11
50.6	35.2	12
11.4	6.4	13
11.4	10.4	14
2.3	4.0	15
5.0	38.4	16 or more
		8. Sex
M	M	
18.4	57.6	
		9. Age
5.2	0.8	Under 20
15.1	29.6	20 to 30
40.1	42.4	31 to 50
38.0	26.4	Over 50

General Merchandise Retail Worker Profile

Non-Supervisors	Supervisor	
		10. For how many years have you been in your present occupation?
12.4	8.0	Less than 1 year
27.5	24.0	1 to 5 years
58.3	67.2	More than 5
		11. How many times have you changed occupations in the past 5 years?
76.9	81.6	0 times
19.0	16.0	1 to 2 times
2.7	2.4	3 or more times
		12. Main emphasis of high school study:
32.2	52.8	College prep
6.2	1.6	Vocational
28.5	32.0	Business Education
8.9	4.0	Distributive Education
1.2	8.0	Scientific
16.7	0.8	None
		13. Highest level of on-the-job employment training program completed:
40.7	10.4	Store procedures
24.0	6.4	Sales training
6.0	6.4	Supervisory training
8.7	68.8	Management training
15.7	6.4	None
		14. Number of times you have transferred from one major task to another within this firm:
74.4	11.2	None
10.3	30.4	1
4.3	19.2	2
4.8	19.2	3
1.0	8.8	4
0.4	5.6	5 to 7
0.0	0.8	8 to 10
0.6	4.0	11 to 20

General Merchandise Retail Worker Profile

Non-Supervisors	Supervisor	
		15. Number of hours worked per week:
4.1	0.0	Less than 20
18.0	0.8	20 to 32
77.1	99.2	More than 32
		16. How many employees do you supervise?
83.5	0.8	None
9.5	35.2	1 to 5
3.1	64.0	More than 5
		18. Check each of the following statements which apply to your major task in the store:
85.3	80.8	Selling
56.8	66.4	Stockkeeping
61.0	32.0	Cashiering
26.2	32.0	Receiving
28.9	55.2	Display
5.0	52.8	Advertising
6.2	15.2	Delivery
26.7	68.0	Record keeping
14.7	56.0	Pricing
11.8	72.8	Buying
11.2	74.4	Controlling
2.5	7.2	Credit control

APPENDIX J

TABLE V

PER CENT OF RESPONDENTS PERFORMING EACH SPECIFIC TASK

SELLING

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
1		2		5		12		29	
3		6		9		14		38	
4		10		13		22			
7		15		21		34			
8		16		25		44			
11		18		32		45			
17		23		33					
19		28		47					
20		30		50					
24		36							
26		37							
27		43							
31		46							
35		49							
39									
40									
41									
42									
48									
51									

Note: Numbers designating each activity are taken from Table IV, page 22-42.

TABLE V (Continued)

KEEPING AND COUNTING STOCK

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
52 54 61 68		53 55 58 62 66 69 70 74 76		56 57 59 63 77		60 65 67 72 73 78		64 71 75	

OPERATING CHECKSTAND AND SALES REGISTER

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
79 81 85 92 93		80 82 84 86 88 95 96 97		89		87 90 91 94		83	

TABLE V (Continued)

RECEIVING, CHECKING AND MARKING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
				99		98		101	
				100		102		107	
				104		103		109	
				105		106		111	
				110		108		113	
						112			
						114			

DELIVERY

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
				115	115	116	122	117	117
				122	116	119	124	118	118
				125	120	120		124	119
					121	121			
					123	123			
					125				

TABLE V (Continued)

KEEPING ACCOUNTS AND RECORDS

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	145		129 133 135 137 144	131 145	130 131 132	135 137	128 141 142 143	126 127 128 129 130 132 133 134 136 138 139 140 141 142 143 144	126 127 134 136 138 139 140

COMPUTING INFORMATION USING MATHEMATICS SKILLS

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	148		146 147 150 155 159		149 152 153 154 156 157 158	146 148 153	151	147 149 150 151 152 154 155 156 157 158 159	

TABLE V (Continued)

PLANNING AND ARRANGING INTERIOR AND WINDOW **DISPLAYS**

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	162		161 165 166 167 169 175	161 162	163 168 170 171 173 183	163 166 167 168 169 175	172 181	160 164 165 170 171 172 173 174 176 177 178 179 180 181 182 183	160 164 174 176 177 178 179 180 182

TABLE V (Continued)

PLANNING, PREPARING AND PLACING ADVERTISEMENTS

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
			188		184		185	184	186
			189		193		191	185	187
			196		204		192	186	190
							195	187	194
							199	188	197
							200	189	198
								190	201
								191	202
								192	203
								193	
								194	
								195	
								196	
								197	
								198	
								199	
								200	
								201	
								202	
								203	
								204	

BUYING MERCHANDISE FOR RESALE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
						205			206
						212			207
									208
									209
									210
									211

TABLE V (Continued)

PRICING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
								213	
								214	
								215	
								216	
								217	
								218	

CONTROLLING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
								219	
								220	
								221	
								222	
								223	
								224	
								225	

TABLE V (Continued)

BUYING MERCHANDISE FOR RESALE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	226		230		227		242		266
	228		237		229		246		
	231		239		241		255		
	232		240		244				
	233		243		245				
	234		252		247				
	235		254		248				
	236		259		249				
	238		261		250				
	253		263		251				
	258				256				
	260				257				
	264				262				
	265				267				
					268				

PRICING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	282		270		269		277		278
			272		271		280		279
			273		274				
			275		276				
			283		281				
			285		284				
			286		287				

TABLE V (Continued)

CONTROLLING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	294 299 310		288 239 291 292 298 303 305 309		293 295 296 297 301 302 304 307 311		300 306		290 308 312

SELLING

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	313 314 315 316		317						

TABLE V (Continued)

KEEPING AND COUNTING STOCK

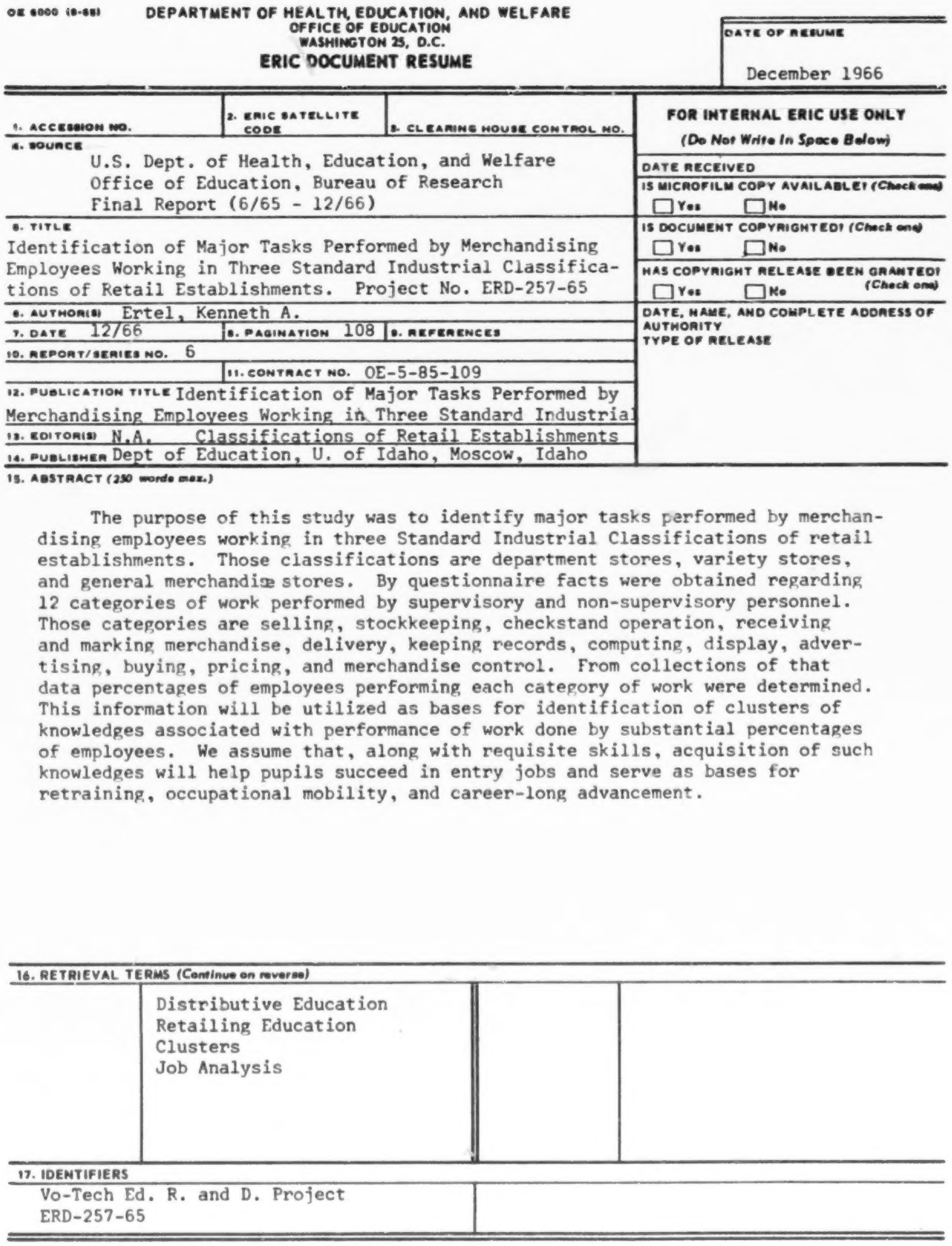
100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	318 319 323		320 321						322

RECEIVING, CHECKING AND MARKING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
			325 327				324 326		

OPERATE CHECKSTAND AND SALES REGISTER

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	329 330		328 331		332				



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OFFICE OF EDUCATION
WASHINGTON 25, D.C.
ERIC DOCUMENT RESUME

DATE OF RESUME December 1966

1. ACCESSION NO.
2. ERIC SATELLITE CODE
3. CLEARING HOUSE CONTROL NO.

4. SOURCE
U.S. Dept. of Health, Education, and Welfare
Office of Education, Bureau of Research
Final Report (6/65 - 12/66)

5. TITLE
Identification of Major Tasks Performed by Merchandising Employees Working in Three Standard Industrial Classifications of Retail Establishments. Project No. ERD-257-65

6. AUTHOR(S) Ertel, Kenneth A.
7. DATE 12/66
8. PAGINATION 108
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10. REPORT/SERIES NO. 6
11. CONTRACT NO. OE-5-85-109
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13. EDITOR(S) N.A. Classifications of Retail Establishments
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The purpose of this study was to identify major tasks performed by merchandising employees working in three Standard Industrial Classifications of retail establishments. Those classifications are department stores, variety stores, and general merchandise stores. By questionnaire facts were obtained regarding 12 categories of work performed by supervisory and non-supervisory personnel. Those categories are selling, stockkeeping, checkstand operation, receiving and marking merchandise, delivery, keeping records, computing, display, advertising, buying, pricing, and merchandise control. From collections of that data percentages of employees performing each category of work were determined. This information will be utilized as bases for identification of clusters of knowledges associated with performance of work done by substantial percentages of employees. We assume that, along with requisite skills, acquisition of such knowledges will help pupils succeed in entry jobs and serve as bases for retraining, occupational mobility, and career-long advancement.

16. RETRIEVAL TERMS *(Continue on reverse)*
Distributive Education
Retailing Education
Clusters
Job Analysis

17. IDENTIFIERS
Vo-Tech Ed. R. and D. Project
ERD-257-65

Figure 3. ERIC Document Resume

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16. RETRIEVAL TERMS *(Continued)*

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